



**BLENDING INDUSTRY VARIETALS:
Developmental Considerations for the South African
Wine Tourism Industry**

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by
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DECLARATION

The Graduate School of Business University of Cape Town

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ABSTRACT

There is consensus that wine tourism summarily offers a strong competitive advantage for wine regions, and can generate profitable business for wineries, other wine-related products and for visitor services. And in the four decades since the first manifestation of South African wine tourism was established in the Stellenbosch wine route, there has been general agreement that South African wine tourism has grown significantly in both local and international reputation and recognition. As a result of the widely identified potential of wine tourism, the South African industry has presented a continuing expectation of sustained industrial growth and tangible developmental manifestations and contributions. However, the industry successes since democracy have more recently been shadowed by an increasingly evident developmental frustration and dissatisfaction on the part of stakeholders, academics and observers. There has been considerable discussion and argument over the growing evidence of non-existent or insufficiently developed industry associative networks, the widespread and overbearing prevalence of a production mindset and the mounting agreement that there are tremendous amounts of further research and investment still required if South African wine tourism is to realize the true value of its assets.

This study identifies and clarifies this prevalent practical problem and research concern of slow and disparate development in the South African wine tourism industry in cognizance of the increasingly evident dissatisfaction and unrealized expectation of South African wine tourism industry stakeholders. Impelled by an incomplete body of knowledge and understanding of the diverse aspects and elements of the South African wine tourism system, the primary overarching research question of discovering why the local industry is not realizing its perceived and identified potential was approached through an exploratory qualitative grounded theory methodology in a critical realist paradigm.

Conducted between January 2007 and January 2010 the research results and findings of this study represent a scientific and academic recognition and formalization of the prevalent industry experience, insight, knowledge, experience and informed opinion of the vested stakeholders, representing not only a comprehensive synthesis of

relevant wine tourism developmental literature but more significantly to the South African industry, it collectively pioneers a significant and valuable contribution to the scarce body of knowledge and research prevalent in the South African context.

Exploring the definitional and subjective complexities of wine tourism within the industrial and organisational dissonance of the South African wine and tourism industries; the ambiguity and uncertainty prevalent in the local wine tourism system were dispelled to emerge a directed and concise understanding of the actual developmental powers, processes, structures and causal mechanisms in South African wine tourism. Wine farmers and producers and the wine routes emerged as the cardinal developmental determinants and resources, tempered by the identification of the prevailing developmental limitations of inconsistent and uniformed expectations of wine tourism, severe industrial, political and organisational fragmentation, disparate stakeholder attitudes and conceptions, incompatible competitive business practices, inhibited capacity and funding, and the relative locally contextualised research vacuity.

In conclusion, the local industry is evidently revealed to be at the limit of its existing developmental capacity as determined by the constrictions and restraints of the current structures and systems. The emergent status quo in terms of voluntary coordination and unfunded cooperative initiatives cannot realistically expand or meaningfully accelerate the developmental aspirations of wine tourism stakeholders. As such, the research revealed the critical importance of advancing of the understanding of wine tourism; in terms of individual perceptions and conceptions, industrial and business requirements, developmental leadership and the comprehension of stakeholder responsibility and involvement. The greater building and dissemination of such understanding of “wine tourism” emerged as fundamentally and unequivocally essential to deconstructing the constraints of currently ingrained paradigms and practices, and facilitating the long-term actionable commitment of stakeholders to achieving realistic but sustainable wine tourism growth and development in South Africa.

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You are South African wine tourism at its very best.

KEYWORDS

Wine Tourism, Wine Region, Developmental Potential, Industry Structure, Policy Environment, Constraints and Limitations, Cooperation and Coordination.

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ABBREVIATIONS

| | |
|-------|---|
| CLD | Causal Loop Diagram |
| CTRU | Cape Town Routes Unlimited |
| CTT | Cape Town Tourism |
| DEDT | Western Cape Department of Economic Development and Tourism |
| DTI | Department of Trade and Industry |
| IPAP | Industrial Policy Action Plan |
| KWV | Ko-operatiewe Wijnbouwers Vereniging van Zuid-Afrika, Beperkt |
| NIPF | National Industrial Policy Framework |
| SAT | South African Tourism |
| SATSA | South African Tourism Services Association |
| SAWC | South African Wine Industry Council |
| SAWIT | South African Wine Industry Trust |
| SAWRF | South African Wine Routes Forum |
| TALC | Tourism Area Life Cycle |
| WCTB | Western Cape Tourism Board |
| WOSA | Wines of South Africa |
| WTF | Wine Tourism Forum |
| WTSC | Wine Tourism Steering Committee |

CHAPTER 1

CHOOSING THE BOTTLE: INTRODUCTION AND OVERVIEW

1.1 Introduction

“There is more to wine and wine tourism than the simple consumption of a beverage or that this experience is limited to the senses and emotions associated with wine alone. Wine tourism experiences are much more than this, relying on the characteristics of the individual..., the setting in which they occur, socialisation with the personalities of wine, and interaction with other elements of the experience such as food, accommodation and other visitors. It is the sum of these elements, not each individually, that make up the winery experience” Mitchell, Hall & McIntosh (2000: 130).

On February 2, 1659, Jan van Riebeeck wrote in his diary "Today, praise be to God wine was pressed for the first time from Cape grapes" (Swanepoel, 2007), and over three centuries of award winning wine production later, with meandering valleys, inspiring mountains, majestic vineyards, active wine routes and a widespread and diverse destination market, the industry of wine tourism in South Africa is enjoying growing recognition and reputation both locally and internationally. Wine tourism is as complex as the product that it centres around; for like the character of a fine wine, it is a synergy of many elements and experiences. It forms an extraordinary blend of the industries of tourism and wine, and comprises a complex palate that is simultaneously a business model, a marketing strategy, a vineyard destination and an intricate, individually conceived and experienced product. It is a concept that encompasses a vast multitude of countries, infrastructures, activities and people and as such has an equally vast array of conceptual definitions, being dynamic in growth, diverse in development and unique in character.

This study is a recognition of wine tourism as an all embracing industry unifying the allure of wine and the attraction of tourism. Both these industries of South African wine and tourism have developed strong and positive images around the world in recent years and are now at the forefront of the world's perception of South Africa.

And it is within this sphere of maturing interest and significance that this study aims to understand how wine tourism developed, currently operates, and intends to grow in the unique environment, setting and context of South Africa.

For any study to be meaningful it has to be relevant to or appropriate in a particular situation and this introductory chapter outlines the research setting and context within which the research occurs through introducing the definitional concept of wine tourism and its potential. Thereafter the chapter elaborates on the problem setting of wine tourism development in the South African context, by outlining the research framework and research questions within a detailed background arguing the motivations and justification of the research itself.

1.2 Defining wine tourism

It has been said that wine tourism is as complex and diverse in nature and extent as wine itself. Inherent in its name, wine tourism encompasses the interaction of both production and supply industries as well as consumption and demand industries. For the tourism industry, “viniculture” is an important component in the attractiveness of a location, while for the wine industry, “tourism” builds first-hand relationships between buyer and maker with smaller wine farms often depending on “out-the-door” sales to the public for their financial survival and sustained business (Hall, Johnson, Cambourne, Macionis, Mitchell & Sharples, 2000: 2). As such, there is a general perspective that “wine tourism” per se, represents the interaction of the wine and tourism industries within a region as they share many commonalities such as geographic co-location and economic, social and resource assets. However, this complementarity, in terms of its nature and economic significance, varies considerably from region to region and from country to country (McRae-Williams, 2004).

1.2.1 Differences in Perspective: The complexity of a singular definition

The formulation of a singularly applicable and unilaterally encompassing definition for wine tourism remains a difficult task, for as each wine region and product differs and varies; so too does the range of experiences that comprise and build the industry of wine tourism. This definitional ambiguity is further complicated by the fact that the

concept and product of wine tourism is still undergoing substantial development and enhancement in wine regions throughout the world (Hall, et al. 2000). This evolving nature of wine tourism's definition stems from the conceptual dependence on the type of stakeholder involved with the associated variety and differences of perspective and opinion. As a result, the approach to defining and conceptualizing "wine tourism" is not uniform.

Subsequently, when viewed from a marketing perspective, the definitional emphasis is likely to be placed on determination of the experiences sought by potential and actual wine tourists. In fact, most definitions of wine tourism do relate to the traveller's motivation and experiences (Getz & Brown, 2006b), with the result that "wine tourism" has been widely defined as "the visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visiting" (Hall, et al. 2000: 3). And it is this market based definition that has informed the majority of international consumer studies of wine tourists and wine festival visitors (Carlsen & Charters, 2006b).

However, a product-based definitional approach is also evident in the international experience, as exemplified in the definition given in the Winemakers' Federation of Australia National Wine Tourism Strategy: "*Wine tourism is visitation to wineries and wine regions to experience the unique qualities of contemporary [Australian] lifestyle associated with the enjoyment of wine at its source – including wine & food, landscape and cultural activities*" (Winemakers' Federation of Australia, 2002: 5).

The South Australian Wine Tourism Strategy further elaborates this definition: "*wine tourism embraces and includes a wide range of experiences built around tourist visitation to wineries and wine regions – including wine tasting, wine and food, the enjoyment of the regional environs, day trip or longer term recreation, and the experience of a range of cultural and lifestyle activities available in wine regions*" (South Australian Tourism Commission, 2004: 4). These definitions from a supply perspective have given rise to a range of studies of the many products and places that comprise the concept of "wine tourism" (Carlsen & Charters, 2006b)

This “market” versus “production” definitional perspective complexity of wine tourism, is argued to be largely due to it being a diverse phenomenon, in both the nature of the product and in the process of delivery. Principally, the wine tourism product cannot be stored, cannot be examined prior to purchase and it is necessary to travel to consume it with the definition involving transport, accommodation, catering, natural resources, and entertainment (Sinclair & Stabler, 1998). Charters and Ali-Knight (2002) suggest that this “product” of wine tourism is practically experienced in a number of ways, most notably, events and festivals, cultural heritage, dining, hospitality, education, tasting and cellar door sales, and winery tours Mitchell (2004, cited in Gallowaya, Mitchell, Getz, Crouch & Ong, 2008: 950) goes on to distinguish between a broad definition of wine tourism, and the specific “visitation of wineries”, the latter of which is argued to represent the most important element of all those that comprise the wine tourism experience (Alant & Bruwer, 2004).

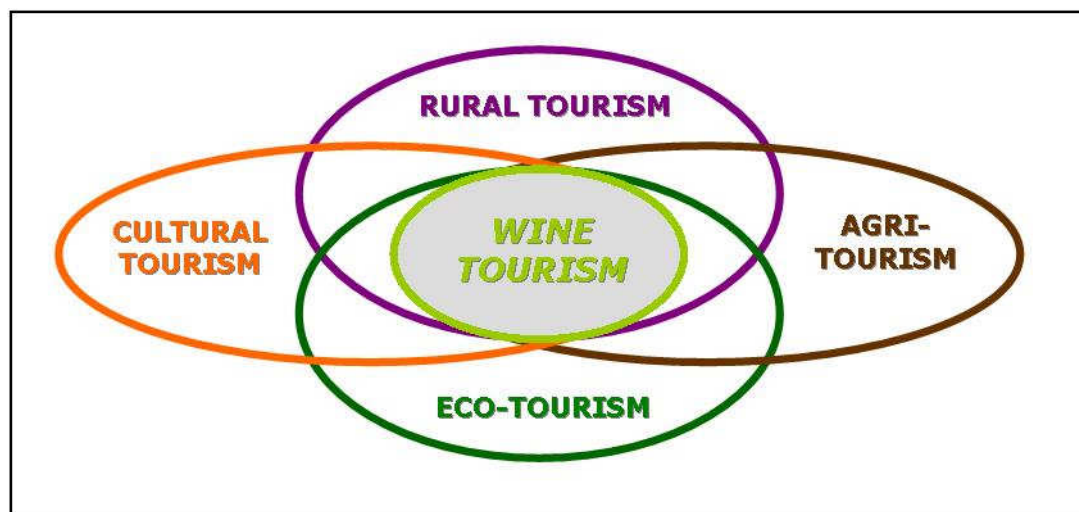
1.2.2 A dynamic definition of a composite industry

In terms of the greater scope of general tourism, wine tourism appears to operate within several identifiable spheres. Primarily through its inherent propensity to occur in rural or non-urban wine regions and areas (although wineries can exist in urban centres (Getz, 2000)), wine tourism is readily identified as a form of rural tourism, which is ostensibly defined as leisure and tourism activities that are carried out in rural areas (Viljoen & Tlabela, 2006). However, rural tourism is a broad and expansive term, capturing a range of further tourism sub-sets and ecological, cultural and traditional elements within which “wine tourism” can be found, including most significantly: Agri-tourism, Eco-tourism and Cultural or Heritage tourism (Getz, 2000; Gopaul, 2006; Roberts & Hall, 2001; Scott, 2004; Viljoen & Tlabela, 2006).

Agri-tourism in the South African context can be defined as where specific positive contributions towards the utilisation of natural farm or agricultural resources occur, involving the stabilising of farm income as well as contributing towards broadening the experiences of visiting tourists (Dettori, Paba & Pulina, 2004; Nowers, De Villiers & Myburgh, 2000). Eco-tourism is explained as where environmentally and socially responsible travel to natural or near natural areas takes place, promoting conservation through low visitor impact and providing beneficially active socio-economic involvement of local people (Department of Environmental Affairs and Tourism,

1996). While finally, Cultural or Heritage tourism is described as where cultural aspects that interest visitors are marketed as such, including the customs and traditions of people, their heritage, history and way of life (Department of Environmental Affairs and Tourism, 1996). In Figure 1.1 (below), Scott (2004) proposes that wine tourism's diversity of market and product has elements that exist and function within the spheres of all of these tourism types.

Figure 1.1: The wine tourism industry within the greater spheres of general tourism.



Source: Adapted from Scott, 2004.

As is apparent, much has been written by both academics and the wine and tourism industries in an attempt to define wine tourism. Wine tourism subsequently emerges as a form of tourism that simultaneously overlaps with many forms of tourism, combining elements of the agricultural, cultural, ecological, communal and industrial landscape and environment (Roberts & Hall, 2001; Scott, 2004; Yuan, Cai, Morrison & Linton, 2005). It encompasses many diverse characteristics including: a lifestyle experience, supply and demand economic forces, an educational component, linkages to art, wine and food, incorporation with the tourism-destination image and as a marketing opportunity which enhances the economic, social and cultural values of the region (Charters & Ali-Knight, 2002).

Getz (2000: 4) emphasises that although it is ultimately the consumer who defines the wine tourism product, there are at least three major perspectives for the definitional consideration of wine tourism: the wine producers, tourism agencies (representing the

destinations), and the consumers. As such, Getz & Brown (2006b: 147) summarily propose a dynamic wine tourism definition by stating that “*wine tourism is simultaneously a form of consumer behaviour, a strategy by which destinations develop and market wine related attractions and imagery, and a marketing opportunity for wineries to educate and sell their products directly to the consumers*”.

This evidently identified composite nature of wine tourism as an aggregate of provided goods and services that facilitate business, pleasure and leisure activities (Smith, 1988) has led to it being perceived as an increasingly lucrative business strategy the majority of wine producing regions in the world. Significantly, there has been a global realisation that the perceived benefits and potential of engaging in wine tourism extend well beyond the cellar door to virtually all areas of the regional economy, and in the last decade, the industry has subsequently experienced considerable international growth (Carlsen, 2004; Hall & Mitchell, 2002; Tassiopoulos, Nuntsu & Haydam, 2004).

1.3 The potential of wine tourism

In South Africa, the growing awareness of wine tourism’s lucrative potential and publicised international growth has lead to it becoming an increasingly prominent business strategy for local wine farms. As an industry, wine tourism has been receiving an increasing amount of attention from researchers around the world and there is broad consensus of the benefits of wine tourism for wineries, farms and the surrounding communities, as well as the industry as a whole (Correia, Ascensão & Charters, 2004).

1.3.1 International value of wine tourism: Some examples from Australia and the United States

The value of wine tourism to the various economies of wine regions and countries broadly includes foreign exchange earnings, the creation of a wide range of full and part-time jobs, and the generation of economic activity in both the wine and tourism sectors (Gallowaya, Mitchell, Getz, Crouch & Ong, 2008).

Internationally, wine tourism is considered a very lucrative industry with recognised potential to generate substantial revenue and forge long-lasting tourism growth (Cambourne, Hall, Johnson, Macionis, Mitchell & Sharples, 2000). Examples of this potential are captured in the high profile success of the United States and Australia. Specifically, the Napa Valley region and vineyards in California, attracted some 4.7 million visitors in 2005, spending an estimated \$1 billion and supporting 17 500 tourism related jobs in the Napa Valley area alone (Napa Valley Destination Council, 2006). More recently in 2008, the wine tourism industry in Australia was estimated to account for over 5 million visitors per annum, worth approximately \$7 billion in tourism spending (Tourism Research Australia, 2009).

1.3.2 South African value of wine tourism: Statistics and figures

In the South African context, wine tourism has over recent years steadily been recognised as an emerging market of growing importance (Tassiopoulos, Nuntsu & Haydam, 2004). It continues to be widely discussed by stakeholders as an industry of “tremendous potential” (Bruwer, 2003: 423), as a powerful value adding tourism strategy, and as an integral part of the sustainability of the greater wine industry (Loubser, 2004; Morris, 2008). With 95 percent of South African vineyards and wine regions located in the Western Cape province, the wine tourism industry is estimated to employ more than 59 000 people and contribute over R4.2 billion to the regional economy of the province, thereby simultaneously accounting for 25 percent of the total income generated by the wine industry in South Africa (Bruwer, 2003; Conningarth Economists, 2004, 2009; Morris, 2008). Furthermore, wine related studies conducted by Cape Metropolitan Tourism (2000), World Travel and Tourism Council (2002) and Grant Thornton Kessel Feinstein (2003) identified that the visitation of wine routes by international and domestic tourists was ranked as the fourth most popular attraction in the whole of South Africa.

Surveys of both local and foreign tourists indicate that “the wine routes of the Western Cape are by far the most visited non-urban tourist attraction of South Africa” (Demhardt, 2003: 118), with between 43 and 45 percent of all international visitors to the Western Cape visiting the winelands (Department of Economic Development and Tourism, 2004b; Distell, 2003). Bruwer (2003: 428) further states that the average visitation for each wine route farm was over 14 000 visitors per year in 2003, with

Bannister (2005) estimating that the total wine tourism market was in excess of 1.7 million visitors, with 1.3 million domestic and 390 000 international wine tourists in 2005 alone.

1.3.3 The importance of the wine farm and “cellar door” visitation

From available research, arguably the most important aspect to these wine tourists when visiting wine regions is the wine farm and cellar door visitation (Alant & Bruwer, 2004; Gill, Byslma & Ouschan, 2007; Macionis & Cambourne, 1998; Olsen & Thach, 2008). The links between the wine product and hospitality environments facilitate a marriage between wine and tourism at the wine cellar door, providing the wine tourist a unique point of first contact. A contact environment that contains elements of both “goods” (the tangible products of wine) and “services” (interaction with staff members, the atmosphere of the locale, etc.) offering the visitor a complete profile of the winery and its wines. It is from this “public face” that perceptions of the winery and farm are formed and established (Bruwer, 2003; Gill, Byslma & Ouschan, 2007; O’Neill, Palmer & Charters, 2002). *“Clearly, the wine tourism concept revolves around the wine region, the wine product and the winery, with its hospitality infrastructure and its visitors”* (Alonso & Liu, 2010: 4).

However, not only are these cellar door visitations an important part of wine tourism as a tourism industry concept, but are also vital to the business of the individual winery operator. Such visits allow the opportunity for wine farms and wineries to establish a link between the emergently important “brand” association and their actual location and facilities; where the cellar door helps to establish or reinforce the image and quality level of the brand as perceived by the visitor (Green, 2006; Fountain, Fish & Charters, 2008; Gill, Byslma & Ouschan, 2007; Mitchell & Hall, 2004). Furthermore, cellar door visits can present an opportunity for wineries to develop long-term relationships with their customers, which can also result in visitors seeking out the winery’s products when they get home and lead to positive word-of-mouth referrals to friends, family and associates (Charters & O’Neill, 2001; Getz, 2000; Nowak & Newton, 2006; O’Niell, Palmer & Charters, 2002). *“All of these factors not only help create long term customers among visitors, but develop brand ambassadors that help spread the word to others who may not have the opportunity to visit”* (Olsen & Thach, 2008: 22)

This cellar door aspect of wine tourism is also attractive to winery operators due to the minimal distribution costs and consequently higher margins associated with cellar door wine product sales (Bruwer, 2007b; Charters & O'Neill, 2001). Many wine producers see cellar door visits as a means of promoting their product and introducing new customers to it; and it is in this role as a cost efficient and accessible distribution channel that tourist visitation to the winery locale is considered to significantly contribute to the wine farmer and producers value chain (O'Neill, Palmer & Charters, 2002; Wilson and Goddard, 2004). Summarily, wine tourism offers benefits not only in terms of the immediate sales generated in the visitor facilities of farms and wineries, but also in the enhancement of the image of the wine, farm and regional brands, providing opportunity for the forging of deep and personal relationships with consumers and to further facilitate the education of wine tourists on the complexity of wine itself (Olsen & Thach, 2008).

1.3.4 Beyond the farm: Regional significance of wine tourism

However, the potential of the wine tourism industry is not limited to the attraction of significant numbers of visitors to wine regions and the identified scope for increases in consumer exposure, brand awareness and loyalty, wine sales margins and educational opportunities but also in social and environmental contribution (Scott, 2004). The moment a wine farmer or owner accepts the presence of tourists on the farm, they are forced to invest in socially acceptable practices. These include the quality of life of their employees and the farm operation and production environment. The availability of the farm premises and facilities to tourists also adds value and attraction to the diversity of sites and experiences on the wine farm, which in turn encourages sustainable tourism at a regional level (Nowers, De Villiers & Myburgh, 2002). Embacher, (1994) also argues that the opening of a wine farm to tourists further provides an environmentally and socially compatible form of tourism, supporting the rural economy and integrating a diversity of people into the mutual and social understanding of the needs of one another.

As such, in the last decade wine tourism has become an increasingly important component of rural development and regional promotion in the South African context. Specifically *“wine and tourism have been recognised as two complimentary rural industries, which have enormous potential to contribute to each other and serve as a*

strong base for the development of a healthy rural economy” (Nowers, De Villiers & Myburgh, 2002: 208). Local business development, infrastructure and services growth, employment generation, local product branding, attracting further tourist visitation, and greater prospective corporate investment are some of the identified potential benefits wine tourism can create for the regional communities in wine producing areas (Beames, 2003; Carlsen & Charters, 2006b; Getz, 2000; O’Neill & Charters, 2000; O’Neill & Palmer, 2004). Indeed, many studies discuss the opportunities the wine tourism industry provides farms and rural wine areas to use and blend hospitality and tourism as vehicles in the marketing of their wine products, facilities, natural surroundings, and even the local communities around them (Alonso & Liu, 2010; Hall, Johnson & Mitchell, 2000). And in a South African context, the wine industry is one of a few national industries that are genuinely concentrated outside metropolitan areas, emphasizing the identified regional developmental possibilities of wine tourism (Bruwer, 2003).

1.4 Problem setting: the South African concern

There is clear and evident consensus that wine tourism summarily offers a strong competitive advantage for wine regions, and can generate profitable business for wineries, other wine-related products and for visitor services (Getz, 1998). In South Africa, the first official recognition of this potential was the establishment of the Stellenbosch Wine Route in 1971, by the owners of three wineries who set about encouraging wine producers to bottle their own wine and open the wine farms to the public (Rust, 1996). In the four decades since there has been general agreement amongst stakeholders, academics, journalists and observers that South African wine tourism has grown significantly; with active wine routes and a rising reputation and recognition both locally and internationally (Bruwer, 2003; Chironga, Demeke, Maloney, Miselis & Scheuermaier, 2006; Green, 2006; Le Roux, 2005; Ponte & Ewert, 2007; Preston-Whyte, 2000; Scott, 2004; Van Zyl, 2005). And as a result of this growth and the widely perceived potential of wine tourism, the South African wine tourism industry has presented an understandable continuing expectation of sustained industrial growth and tangible developmental manifestations and contributions.

1.4.1 South Africa: A frustrated and fragmented industry

However, the successes of the past decade have more recently been overshadowed by an increasingly evident developmental frustration and dissatisfaction on the part of the vested stakeholders, role-players, academics, journalists, bloggers and observers (Department of Economic Development and Tourism, 2004b; Du Plessis, 2005; Frandsen, 2005a, 2005b; Gilfellan, Kreft, Malherbe, Morgenthal, & Sleet, 2007; Krige, 2005b; Lombard, 2004; Sleet, 2008b; Van Zyl, 2005). Summarily, there has been considerable discussion and significant argument over:

- the growing evidence of non-existent or insufficiently developed industry associative networks,
- the widespread and overbearing prevalence of a “production” mindset, and
- the mounting general agreement that there remain tremendous amounts of further research and investment that are still required if South African wine tourism is to realize the true value of its assets (Bannister, 2005; Biggs, Botha, Christie, Maxwell, Retief, Slabber & Titus, 2009; Bruwer, 2003; Du Plessis, 2007; Loubser, 2004; Sleet, 2008a; Taylor, 2009).

From both the evident local and international experience, it is apparent that tourism and wine stakeholders are not necessarily very easy to actually get together and moreover, wine regions do not automatically transform into wine destinations (Carlsen & Charters, 2006b; Macionis, 1997). As such, despite its positive and widely identified and discussed potential, “wine tourism” can evidently be rather hard to implement, with a significant investment of time, money, collaborative effort and community partnership being recognised as prerequisites to the development of a successful and sustainable wine tourism region, and key questions being raised as to whether or not the wine and tourism sectors are always well-suited to each other in terms of business integration and also with regard to the driving motivations (Fraser & Alonso, 2006; Getz, 2000, Thach, 2007).

However, with South African wine tourism deemed to be at a pivotal stage of its development, the industry setting is increasingly fraught with fragmentation of developmental management, operation and capacity (Heyns, 2009). Indicative of this is that despite the evident identification of the wine tourism potential of and for South

Africa, there has been no generic marketing of wine tourism, nor has a coherent developmental strategy been implemented (De Kock, 2004).

1.4.2 South Africa: Unique developmental experience

This “fragmentation” is a primary exemplification of the South African wine tourism developmental experience – an experience which when compared to other wine countries, differs dramatically. In contrast, successful international wine country government’s such as Australia, Spain and the United States have specific structures in place to identify wine tourism possibilities, naturally leading to government initiatives to create strategies and provide funding to build the necessary management, promotion and infrastructure components that are fundamental to developing wine tourism (Anson, 2007; Thach, 2007). However, in South Africa, the entire wine tourism industry is self-funded, relying on the initiatives and funding of the private sector (wine farmers, producers and organisations), with no direct national or provincial developmental support, capacitation, coordination or direction (Department of Economic Development and Tourism, 2004a; MediaVision, 2006).

1.4.3 South Africa: Unclear industrial structures and management

Wine tourism in South Africa subsequently finds itself as an industry that is overwhelmed by a bewildering array of organizations, associations and companies; each working independently of one another, marketing different wine and tourism brands, and positioning themselves differently with different sets of objectives and motivations, effectively fracturing any developmental focus or initiative (de Kock, 2004, du Plessis, 2007). And it is within this fragmented setting that the absence of collective guidance, market direction or the orchestration of market data or intelligence has hampered wine tourism from evolving and developing the levels of potential that are widely identified and expected by stakeholders (Bannister, 2005; Frandsen, 2005b; Green, 2006; Le Roux, 2005, Van Zyl, 2005).

1.4.4 Contextualising the research concern

However, South African wine tourism is still in a relatively immature stage of its development, and although South Africa has been producing wines for about 350 years, wine tourism is actually still considered to be in an industrial infancy (Preston-Whyte, 2000; Tassiopoulos D, Nuntsu N & Haydam N, 2004). As such, when

compared to South Africa's new world wine competitors such as Australia and the United States, the local wine tourism developmental experience has yet to unlock or practically realise the perceived potential and possibilities. Indeed, the concept of wine tourism as a whole remains remarkably untapped or exploited in the local context (Deloitte & Touche, 2008; MediaVision, 2004). This increasingly evident lack of observable congruence between the perceived potential and expectation of wine tourism on the part of stakeholders, and the actual industry developmental progress and contribution over recent years, has manifested itself in a rising dissatisfaction and frustration. Wardman (2007) emphatically captures this frustration in a financial context: *"Wine tourism currently contributes R5.5 billion to the [South African Western Cape] provincial economy. It should be twice as much!"*

As such, the research concern for this dissertation emerged in recognition of this frustration and dissatisfaction in the perceived slow and disparate South African wine tourism developmental situation. The following section explicates how the research process was advanced from this concern toward formulating an overarching research question to guide the pursuit of research answers that could plausibly deal with the concern in question.

1.5 Background to the research

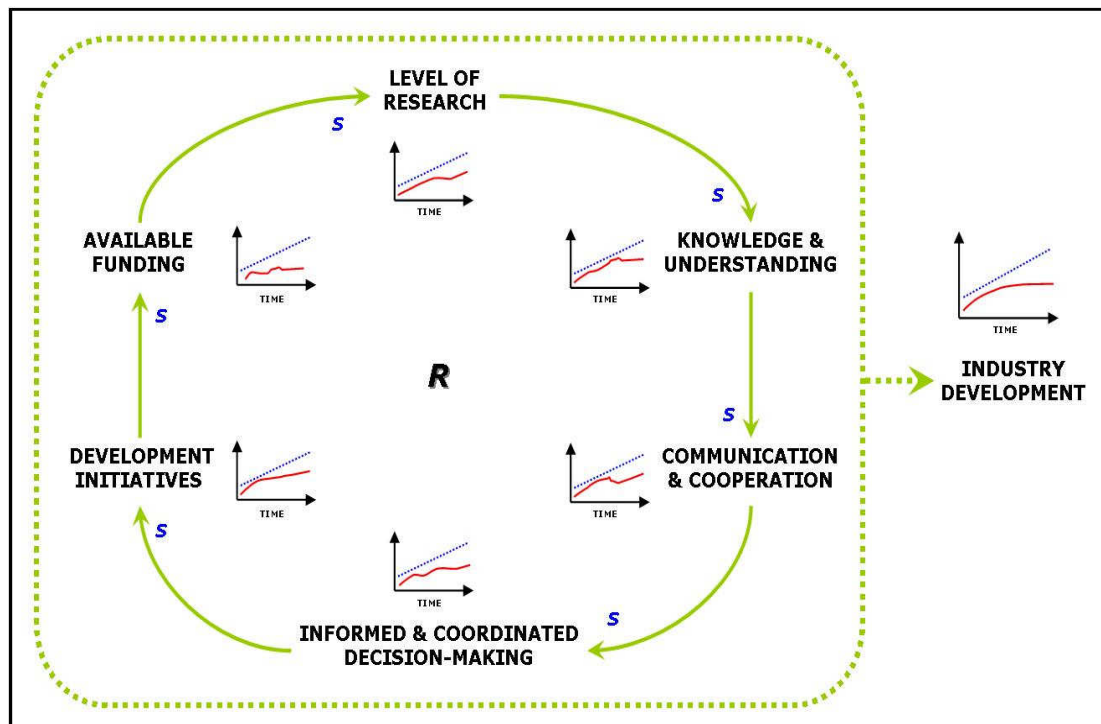
It is an underlying assumption of qualitative research that all of the concepts pertaining to a given phenomenon, such as wine tourism have not yet been identified (Strauss & Corbin, 1990). And in terms of this study, such incomplete knowledge was indeed the catalyst to formalising and commencing this study's research process, which started with the researcher adopting a learning approach to attempt to identify and delimit the practical problem and concern of the South African wine tourism research setting from a tourism supply-side stakeholder perspective. This particular point of view was taken primarily as a consideration of the researcher's strategic intent, personal interests and experience, but also to pursue the principal academic programme context of management practice.

1.5.1 Entering the research field

Having identified and clarified the practical problem and concern of this study as the slow and disparate development in the South African wine tourism industry; the researcher developed an initial conceptual framework to flesh out the initial research thesis that stemmed from the perceived local wine tourism concern. This comprised of the researcher articulating his initial conceptual understanding of the system of interest and its meaningful properties, i.e. the behaviours and relationships initially identified and believed to be involved in the causal mechanisms of wine tourism development that determine the current frustrating and unsatisfactory situation.

The articulation of these behaviours and relationships was visually depicted in a basic initial representation of variables that can be observed and graphically plotted over time (Ryan, 2006a). Figure 1.2 illustrates this representation in a reinforcing loop of causal relationships and linkages for these identified variables as they were initially understood by the researcher to interact and determine the primary concern of the study – the unsatisfactory level of wine tourism industry development in South Africa.

Figure 1.2: Researcher's initial basic conception of the causal behaviours in South African wine tourism development, 2007.



These “behaviours over time” are represented in Figure 1.2 as graphs where the particular behaviour (the red line) is perceived to be falling below an expected or satisfactory level (the blue line) – outside the “envelope of desired behaviour” (Ryan, 2007a). According to this initial conceptual framework of the researcher, the primary problem in South African wine tourism development was perceived to be a funding and associated research shortfall, whereby a change in either of these particular behaviours would result in a change throughout the postulated causal loop, indicated by the “S” symbol which signifies a change in the “same direction”. As such, it was postulated that if more funding was made available (increased), then more wine tourism-specific research could be conducted (increased). Similarly, if funding was decreased, then associated research would also decrease, thus illustrating the “S” (same direction) relationship.

The initial causal loop representation continued with the relationship between the amount of conducted research and the level of contextualized knowledge and understanding of the South African industry, whereby an increased or decreased level of wine tourism research would respectively improve (increase) or limit (decrease) stakeholder comprehension of the nature, extent and systems of wine tourism. It was then subsequently conceived that the resultant increase or decrease in such knowledge and understanding would then thereby respectively encourage (increase) or hamper (decrease) the level of communication and cooperation amongst local industry stakeholders. Such communications and cooperation levels were then further perceived to have a relational impact upon the amount of coordinated and informed decision-making, whereby the degree of communicated knowledge and cooperative understanding determined the local wine tourism stakeholder’s ability to make more or less informed and coordinated strategic and management decisions. From this relationship, it was finally postulated that such improved or worsened decision-making would determine the amount of wine tourism development initiatives that were undertaken.

Through their interactions, these behaviours complete a reinforcing feedback loop of variables and relational links (indicated by an “R” in Figure 1.2) that were initially deemed to be responsible for co-producing the slow and (in behavioural terms), unsatisfactory levels of wine tourism development, which accordingly was not

realizing its perceived potential. However, questions immediately arose from this initial visualization, particularly regarding the relational assumptions and causal arguments the framework made. It quickly became apparent that this view of South African wine tourism development was far too simplistic. But this basic and ultimately uncertain, initial conceptual framework reflected not only the researcher's personal lack of pertinent knowledge and an initial inexperience with systems diagrams, but also significantly reflected the emerging broad lack of scientific research and contextualized knowledge available in terms of South African wine tourism development.

1.5.2 Lack of wine tourism research

Following the international growth of the wine tourism industry in the last decade, there have been increasing numbers of both market and production based studies of the industry, and subsequently the totality of published research on wine tourism continues to grow (Carlsen, 2004). However, the greater wine tourism research basis is considered to be disparate, where the motivations for data collection are often merely reactionary and in isolation of broader industry research needs and outcomes. The unfortunate consequence hereof is that even today, many areas around the globe with the perceived potential to become high quality international wine tourism destinations have been ignored in contemporary research (Alonso, & Liu, 2010; Joint National Strategic Partnership, 2005).

This is particularly relevant in the South African context, where wine tourism research summarily remains insufficient (Taylor, 2009; Bruwer, 2007b; Carlsen, 2004; Preston-Whyte, 2000). For despite the clear local identification of wine tourism's potential as a lucrative wine farm business enterprise, and the broad recognition of the significant economic contribution of tourism enterprises; there remains very little place- or regional-specific research done on the development of wine tourism in South Africa and the marketing thereof. Nor indeed is there a coherent statistical picture of the industry at a national or provincial level (Department of Economic Development and Tourism, 2004c; Dube, 2006; Nowers, De Villiers & Myburgh, 2002).

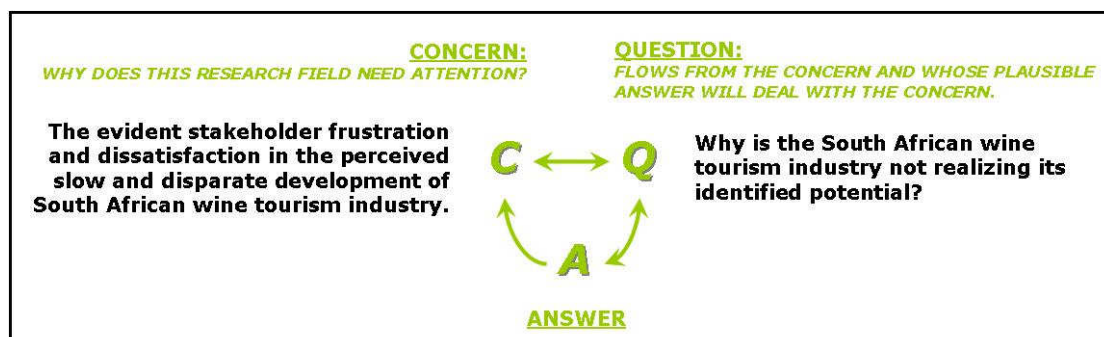
Furthermore, of the little wine tourism specific research that does exist in South Africa, much of it is deemed to be ad hoc, or of an anecdotal nature leaving a considerable data gap with no industry-specific consistent, regular or annual tracking undertaken (Frandsen, 2005b; Le Roux, 2005). Tassiopoulos Nuntsu & Haydam (2004: 52) concisely summarise the relevant research situation in South Africa:

“considering that South Africa has been producing and marketing wines for a number of centuries, the development of South African wine tourism... is not well researched.”

1.5.3 Introduction to the research framework

Within the research setting that is characterised by this lack of accessible and relevant scientific research and a shortage of intrinsic localised wine tourism developmental knowledge; the need for significant investigation into understanding the diverse aspects and elements of the South African wine tourism system and its development was emphatically revealed. Recognising this evidently incomplete knowledge and understanding of the South African wine tourism context, and flowing from the research concern of evident frustration and dissatisfaction in the perceived slow and disparate South African wine tourism development, the primary over-arching research question driving this study became quite simply why? *Why is the South African wine tourism industry not realizing its identified potential?* Figure 1.3 graphically illustrates this developmental link in the central thesis of this research.

Figure 1.3: The research concern and question link in the central thesis of the research.



In formulating this research question, it also represented the further identification and delimitation of the central research problem of the study; i.e. identifying what is not understood and needs to be studied in order to address the research concern of slow and disparate wine tourism development (Booth, Colomb & Williams, 2003). Supported by the lack of localised scientific research and the researcher's cognizance of a perceived knowledge shortfall; the research problem for this study was thereby narrowed and definitively expressed as researching and finding out *what is actually going on in the South African wine tourism industry?*

Under the initial guidance of the primary research question, further specific research questions emerged; encapsulating the research problem and defining what needed to be answered, i.e. specific data that needed to be gathered and concepts that needed to be understood. These emergent questions were refined and focused as the research progressed and the data gathering, generation and analysis processes continued and as such, five refined research questions evolved to focus the research into ultimately finding answers that could plausibly address the identified concern for wine tourism development in South Africa. These refined research questions were finally captured during the course of the research process as:

RQ1: What is the developmental history of South African wine tourism?

RQ2: Who is responsible for the development of the wine tourism industry in South Africa?

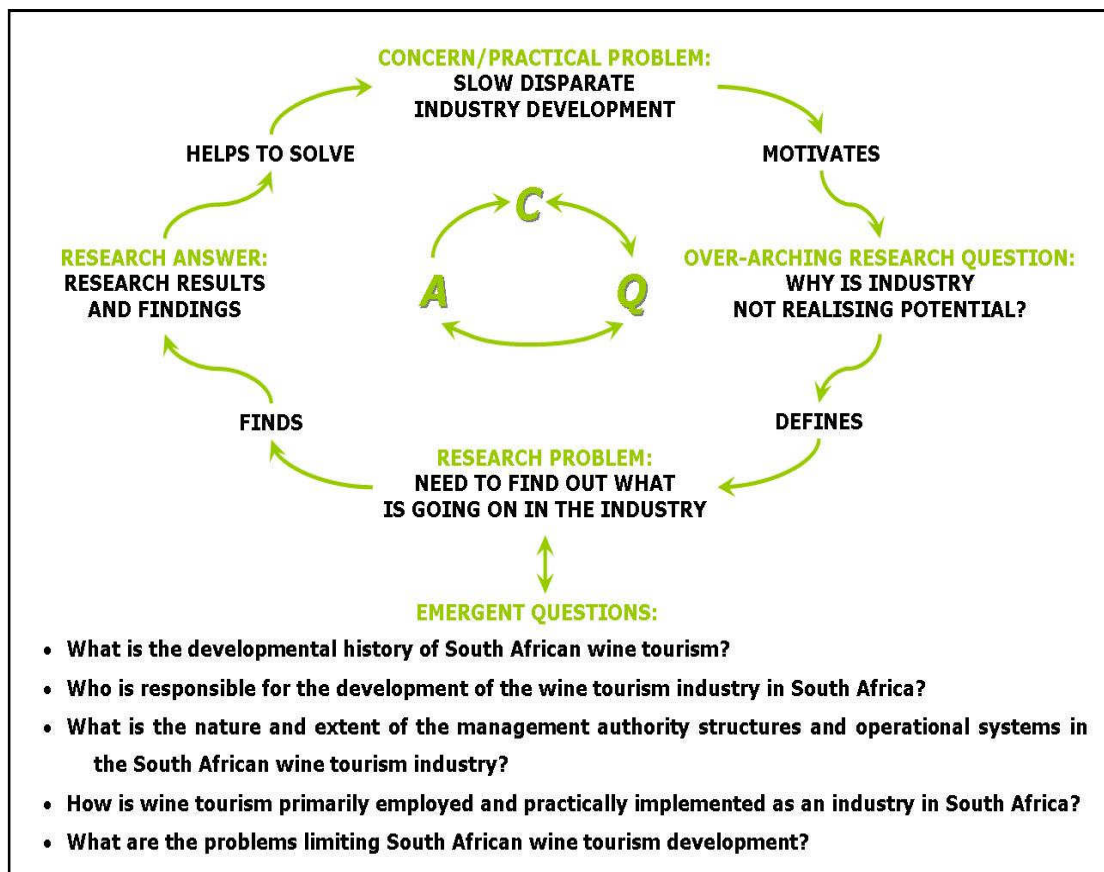
RQ3: What is the nature and extent of the management authority structures and operational systems in the South African wine tourism industry?

RQ4: How is wine tourism primarily employed and practically implemented as an industry in South Africa?

RQ5: What are the problems limiting South African wine tourism development?

Figure 1.4 (overleaf) graphically illustrates a summary of the research framework development process and lists the five refined emergent research questions that evolved iteratively to thematically drive the research investigations that will be methodologically explained in Chapter 3.

Figure 1.4: The research framework development process.



Source: Adapted from Booth, Colomb & Williams, 2003.

1.6 Justification of the research

Evidently unique and complex in nature, the South African wine tourism industry setting presents a heritage that is simultaneously both new and old world, with a 350 year old wine production legacy and a relatively youthful 16 year old post political isolation tourism industry. Within this context, wine tourism is widely acknowledged and discussed by South African stakeholders and participants as an industry of tremendous potential and expectation, with award winning wines, active wine routes and a diverse destination market. However, the current broad industry experience of recent years has not manifested or realized the full extent of this identified potential, particularly when compared to South Africa's new world wine competitor countries.

“Undoubtedly wine tourism [in South Africa] is a significant tourism icon and the need exists to aggressively position and promote the Western Cape as a wine tourism destination to achieve the recognition and awareness of the destination as has been achieved for example in France, Italy, California and Australia” (Frandsen, 2005b: 1).

However, the recent approaches to promoting and developing wine tourism have been documented as largely fractured, with inconsistent and disparate levels of developmental accomplishment and success. The situation is further compounded by insufficient levels of South African-specific scientific and market research in the wine tourism field. This fragmentation and research shortage both have serious implications for the effectiveness of developmental policy, plans, initiatives and operations for wine tourism. This research is then an academic response to cognizance of a concern that can be captured in four primary research motivations:

- the emergent shortfall in South African contextualised research and wine tourism knowledge,
- the evident industrial and organisational dissonance in the local industry,
- the growing dissatisfaction and unrealized expectation of South African wine tourism industry stakeholders, and
- the researcher’s personal interests and professional career ambitions.

As such, this research intends to adopt a learning approach to the study field of South African wine tourism, exploring and analysing the developmental heritage and industrial systems to uncover the central structures, powers and mechanisms that have combined to shape the current developmental situation of the industry - a field of research that has only received speculative investigation to date. By examining the various stakeholder groups that represent the broad spectrum of wine tourism activities, and delving into the historical emergence and managerial experience; the overall comprehension of the forces and relationships actually involved in South African wine tourism can be improved, thus dispelling popular speculation and facilitating a uniformed conceptual perspective for all stakeholders.

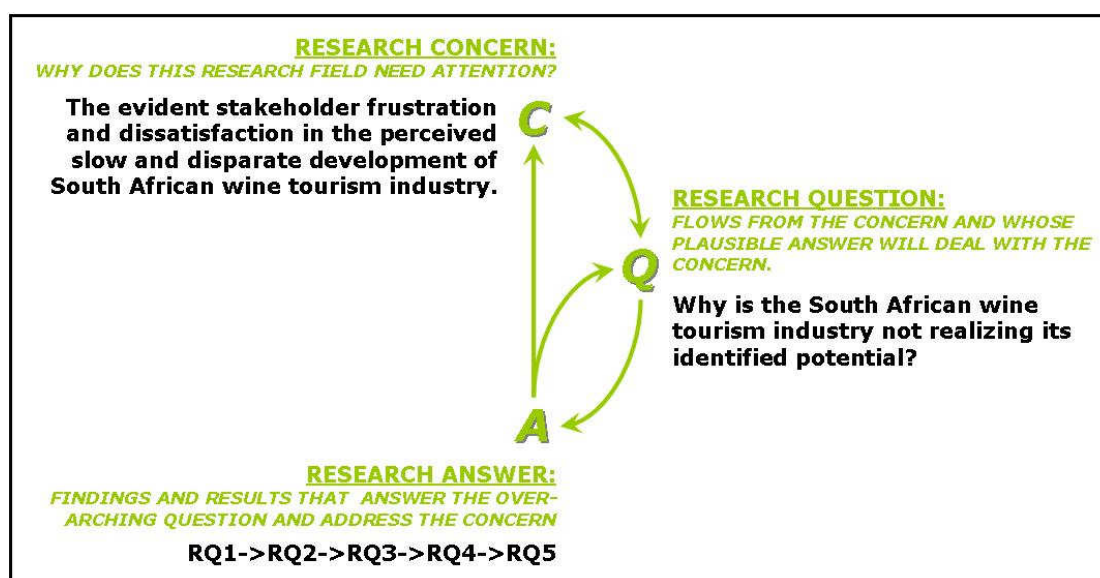
Furthermore, in the identification of the determinants and limitations of successful and sustainable wine tourism growth and development within the South Africa context and industrial setting; further insight is provided into behaviours and paradigms that need to be understood and affected in order to align the perceived value and potential of the local industry with the plausible developmental reality of South African wine tourism.

Through exploring the nature and extent of the local industry in terms of its developmental heritage, developmental responsibility, industrial structures, practical implementation and the limitations, this study will provide a grounded insight into the actual conditions and reality of wine tourism development in South Africa. In doing so, a clear and unambiguous perspective on the local setting and context will be established through:

- contributing significantly to the broader academic body of knowledge and practical understanding of wine tourism in South Africa,
- informing and educating stakeholders in both the greater wine and tourism sectors,
- identify critical problems and conflicts and propose priority actions, and
- providing empowering data that can unify strategic decision-makers and focus developmental policy formulation.

As such, the research findings and results of this study are expected to address and help to solve the research concern of evident frustration and dissatisfaction in the perceived slow and disparate South African wine tourism development by providing answers to the research question of why is the South African wine tourism industry not realizing its identified potential? This central thesis that serves as the backbone of the entire study is illustrated in Figure 1.5 (overleaf).

Figure 1.5: The central thesis of the research.



1.7 Conclusion

This chapter has introduced the identified practical problem and research concern of this study as the evidently slow and disparate development in the South African wine tourism industry. Contextualised within a definitional discussion and examination of the potential of wine tourism, this chapter further acknowledges the emergent frustration and dissatisfaction in this perceived concern and problem and introduced the primary research question to drive the study as the need to uncover why the South African wine tourism industry not realizing its identified potential. And in describing the research background and articulating the conceptual understanding of wine tourism development, five refined research questions evolved to focus the ongoing research in the South African context - a context that has been explained to be characterised by a lack of accessible and relevant scientific research and a shortage in intrinsic localised wine tourism developmental knowledge.

In its proposed strategy for addressing of the research problem by finding out what is *actually* going on in the South African wine tourism industry, this chapter concluded by outlining the motivations and justification for this study, arguing its academic value and industry relevance. Finally, the central thesis that serves as the core

foundation of the study was summarised and explained in the continuing inter-relation of research concern, research question and research answer.

The following chapter presents a comprehensive literature review, where the main concepts, issues and considerations pertinent to this study are examined within the broader body of existent knowledge.

"Wine is a constant proof that God loves us and wants us to be happy."

Benjamin Franklin (Ecask, 2007).

CHAPTER 2

READING THE LABEL: LITERATURE REVIEW

2.1 Introduction

This chapter explores the relevant literature and existent research pertinent to this wine tourism developmental study. Structured according to the research framework of the guiding and refined research questions, this chapter contextualises the research background and literature setting of the identified practical problem and concern of slow and disparate development and that the potential of wine tourism is not being realised in the South African industry.

Drawing on the available international and local literature and published documentation, this chapter firstly lays out a general framework of considerations for wine tourism research as a study field, highlighting the inherent importance of research itself and introducing the use of tourism development modelling to describe and analyze the development of wine regions within the holistic context of wine tourism in South Africa. Secondly, the developmental setting and circumstance of the South African wine and tourism industries are independently reviewed including relevant historical considerations and the pertinent developmental policy environment in South Africa.

The evident definitional complexity of wine tourism is also further reviewed. Particularly the noted subjectivity that is prevalent in terms of identifying the full scope of wine tourism industry activities and recognising levels of industry involvement is examined, along with a fuller consideration of the greater potential impacts and influences of wine tourism development and also a reflection upon the matter of developmental leadership and responsibility. As such, the main concepts, issues and considerations pertinent to this study are introduced and examined within the broader body of existent knowledge.

2.2 Contextualising wine tourism research

As introduced in the previous chapter, there is considerable consensus as to the potential of wine tourism as a wine farm business, a branding tool, a tourism enterprise, a point of sales and as an agent of regional development. However, although recent years have been marked by an increase in academic and scientific wine tourism research, there remains a significant knowledge gap and literature shortfall in terms of the contextualised South African-specific industry research and information.

This section outlines the greater framework of wine tourism research and contextualises the available South African wine tourism developmental literature and research.

2.2.1 Perspective as the determinant of wine tourism research

From the available literature, it is apparent that the majority of wine tourism research is conducted in foreign markets (Cambourne et al, 2000; Carlsen & Charters, 2006b; Getz, 2000; Getz & Brown, 2006a); with approximately two thirds of wine tourism literature coming from Australia and New Zealand, with Canada and the United States being the dominant source countries of the remaining literature (Mitchell & Hall, 2006). However, within this literature and existent research, over the years there has emerged a distinct sectoral split – wine tourism research undertaken separately by the wine industry and the tourism industry. This wine / tourism sectoral differentiation is widely identified in the varying perspective priorities and diverging motivational drivers that then subsequently affect the research orientation and applicability of the relevant studies (Carlsen, 2004; Gallowaya, Mitchell, Getz, Crouch & Ong, 2008; Carlsen & Charters, 2006b; Getz & Brown, 2006b).

Underlying this “wine” or “tourism” based research orientation is the diverse complexity of the wine tourism definition, as it too is essentially governed by and subject to the specific perspective and industry involvement of the defining individual (Cambourne, et al. 2000; Getz, 2000). Charters & Carlsen, (2006: 267) emphasise this sectoral research differentiation in their summary of the different strategic intents of key wine tourism stakeholders:

“For public authorities the key goal is probably regional, economic (and perhaps social) development. For a tourism focussed organisation wine tourism may be their livelihood, or a substantial part of it. For a wine producer, [wine tourism] is an ancillary part of their marketing strategy.”

The wine industry and the tourism industry therefore fundamentally represent opposite ends of an industrial spectrum, with the characteristics of each activity essentially different in a microeconomic sense:

“wine production is mainly a primary and partially secondary industry-based activity characterized by being supply-led, price-taking, producing a standardized, homogeneous product, cost-minimizing and reliant on capital growth to create wealth, while tourism as a service industry is characterized as being demand-driven, price-making, heterogeneous product/service, profit maximizing and relying on profits to create wealth” (Carlsen, 2004: 8).

As a result, the definition and conceptualisation of “wine tourism” has not resulted in or generated a uniform approach of perspective or emphasis (Getz & Brown, 2006a). This sectoral dissonance between the “wine” or “tourism” based industry and its effect on wine tourism research is detailed in Table 2.1 (overleaf), which is a representation of Carlsen’s (2004) wine tourism research framework that describes the different wine and tourism orientations, motivations and operations that guide and influence contemporary wine tourism research.

From Table 2.1, the diversity and explicit contrasts of perspective, understanding and industrial positioning of the specific agent of research are clearly defined. And it is from these contrasting industrial perspectives of the wine and tourism sectors, with the associated sectoral definitional “wine tourism” ambiguity that consequently result in “wine tourism” research emerging to generally fall into either a “production” focus (wine based) (Carlsen & Dowling, 2001; Scott, 2004; Sparks & Malady, 2006) or “market” focus (tourism based) (Alant & Bruwer, 2004; Gill, D., Byslma, B & Ouschan, R. 2007; Mitchell, Hall & McIntosh, 2000).

Table 2.1: Sectoral differentiation of the wine tourism industry.

| PRIMARY INDUSTRY ↔ SECONDARY INDUSTRY ↔ TERTIARY INDUSTRY | |
|--|--|
| WINE INDUSTRY | TOURISM INDUSTRY |
| Supply-led - subject to seasonal, temporal, global, technical and agricultural factors that set the supply of grapes and wine. | Demand-driven - subject to economic, consumption-led, competitive, demonstrative and demographic forces that determine demand for wine tourism. |
| Price takers - single price is determined by wine producers, global wine prices, price of other alcoholic beverages (substitutes). | Price-makers - price range is determined by nature of product/service offered, seasonal demand, value-adding to experiences. |
| Homogenous product - highest quality standard varietals or blends, long lead times for changes in production, consistent over time. | Heterogeneous product/service - a range of options and offerings and short lead times to develop new products, changing over time. |
| Cost Minimisers - seek more efficient production methods, technology intensive, innovate to maximise yield. | Profit maximisers - seek maximum returns through extensive marketing, labour intensive, imitate, renovate or renew rather than innovate. |
| Wealth creation through capital growth in value of land and buildings in the long-term. | Wealth creation through profits and return on investment in the short-term. |

Source: Carlsen, 2004: 9.

2.2.2 The importance of research for wine tourism development

The significance and value of research in itself is inherently found in its scarcity. Particularly in the local wine tourism context that is punctuated by a lack of relevant research, it is essential for wine tourism stakeholders, regardless of sectoral perspective, to be empowered by research and data – to understand the nature and intricacies of the industry. This is vital if any of the perceived benefits and potential of wine tourism are to be realised, or indeed if any industry development is to be successful and sustainable.

There is widespread recognition hereof in the reviewed literature’s coverage of the “under-researched” nature of wine tourism in general, not only in developmental understanding, but also in wine tourism-specific market data and industry information (Beames, 2003; Carlsen, 2004; Hashimoto and Telfer, 2003). Given the apparent value and scale of the wine tourism industry revealed in the literature, it is thereby also deemed essential that wine regions develop strategic decision making capability on the back of formal market and industry research programmes that will enable the industry to determine critical market trends, networks and associated opportunities (Frandsen, 2005b).

Specifically, for the wine sector, research and market intelligence information is identified to help determine and understand consumer behaviour and purchasing trends; providing valuable insight into the market share of certain products, their value, distribution channels, price points and the consumer purchase motivations. For the tourism sector, the benefits of market intelligence and research also underpin strategic planning operations, marketing, and branding. For both sectors then, it is clear that without reliable and relevant research and data, informed decision-making and strategy formulation becomes increasingly difficult, and in the competitive modern world of wine tourism, having good market intelligence can quite simply mean the difference between success and failure (Australian Wine and Brandy Association, 2008; Correia, Ascensão & Charters, 2004; Winemakers' Federation of Australia, 2003).

As such, research explicitly forms a unanimous “priority”, “action”, “objective” and “leverage point” not only in the available significant international wine tourism texts (Carlsen & Charters, 2006a; Getz, 2000; Hall, Sharples, Cambourne & Macionis, 2000), but also in accessible international wine tourism development strategies (Economic Planning Group of Canada, 2001; Frandsen, 2005b; Joint National Strategic Partnership, 2005; South Australian Tourism Commission, 2004, 2009; Wine Tourism Strategic Workshop, 2009; Winemakers' Federation of Australia, 2002). Summarily then, the importance of “research” whether defined as industrial understanding, market insight, visitor demographics, stakeholder analysis or relational and associative evaluation, is overwhelmingly established and agreed upon.

2.2.3 The South African wine tourism research situation

However, in South Africa the issue of market intelligence and research relevant to the local wine tourism industry is considered to be in a critical state (Frandsen, 2005b). In totality, the amount of available literature and published data on South African wine tourism is insignificant in comparison to competitive new world wine producing countries such as Australia and the United States, with only a relative handful of locally-specific academic and scientific investigations being completed and made accessible (Bruwer, 2003; Demhardt, 2003; Green, 2006; Le Roux, 2005; Nowers, de Villiers & Myburgh, 2002; Randle, 2004; Scott, 2004; Tassiopoulos, Nuntsu & Haydam, 2004; Van Zyl, 2005). There are some South African “wine industry” and

“tourism industry” based studies that include a conception of “wine tourism”, however their “wine” or “tourism” sectoral differentiation of perspective (as introduced previously) means that very little specific emphasis is paid to South African wine tourism and its development per se (Allen & Brennan, 2004; Black & Laubser, 2001; Blok, 2007; Cornelissen, 2005; Green, 2006; Henri, 2005; Meyer, 2004; Stoop, 2007; Visser & Rogerson, 2004).

In terms of South African wine tourism market intelligence, in the last five years there have evidently been some wine tourism-specific market and event data surveys conducted by individual wine routes and a wine company in South Africa (Bruwer, 2005a; 2005b; 2006; 2008; Kreft, 2007; Le Roux, 2008; Scott, 2008). However, issues of cost, accessibility, and their short-term delimitation temper their greater industrial value. Moreover, the studies regionally limited sphere of geographic reference undermines the captured data’s comparability and applicability to the rest of the national wine tourism industry. As such, the research findings of these studies cannot accurately reflect the overall performance or characteristics of the South African wine tourism industry as a whole; nor are they able to accurately establish greater industry trends or patterns (Frandsen, 2005b; Mitchell & Hall, 2006).

Compounding this evident research shortage is that in South Africa, wine tourism is not specifically identified, delineated or captured in the monthly or annual national and provincial “tourism” or “wine” industry market and industry statistics and reports that do currently exist. Indeed, the South African tourism industry as a whole has identified that tourism research in general is “lacking” (Department of Economic Development and Tourism, 2004a; 2004c; 2006) and in more emphatic wine tourism terms, the wine industry has identified that basic relevant wine tourism data such as a *“reasonably trustworthy figure of the number of tourists who actually venture into the winelands... is not readily available”* (Conningarth Economists, 2009: 18). Such is the research situation that current wine tourism statistical analysis in South Africa is collectively considered speculative at best with *“much more research needed”* (Conningarth Economists, 2009: 8).

This greater concern for South African wine tourism research, information and data is concisely captured in the evident issues facing South African provincial and local tourism authorities, which have explicitly been identified to include:

- *“A lack of consistently collected and analysed data that can be effectively interrogated at a provincial level. This has resulted in a product driven approach rather than a consumer driven approach.*
- *The customer communication process is currently not being applied consistently in all marketing activities. Approach is ad-hoc and reactive due to a lack of understanding of priority segments.*
- *Information distribution is ad-hoc and not informed by market research and segment needs, due to a lack of information.*
- *Mechanisms that measure the impact of campaigns are not complete due to the weaknesses of data collection and a lack of detailed strategic planning.*
- *Participation of private sector, trade, media etc. in domestic tourism has been limited due to a lack of market understanding and lack of confidence in the future direction of domestic tourism”* (Atos KPMG Consulting, 2006: 32-33).

Similarly, the South African wine industry also demonstrates an insufficiency of relevant and reliable research. However, the wine industry does evidently specifically identify and include “wine tourism” in three quantitative macro-economic wine industry impact studies (Conningarth Economists, 2000; 2004; 2009). But despite inclusion herein, the latest 2009 report specifically and categorically states that wine tourism research and information in South Africa is “*scant*”, with “*relevant [wine tourism] data scarce, if not unavailable*” (Conningarth Economists, 2009: 8). The report further emphasizes that regarding what wine tourism data is currently available in South Africa, “*there is no doubt that further in-depth studies are required to refine these figures down to levels required by tourism functionaries*” (Conningarth Economists, 2009: 18)

In terms of general research, Spies (2002) notes that the South African wine industry has well-established research and educational institutions, but reflective of the similar funding issues in the tourism industry, the financing of these wine institutions is currently only about half of what is considered international best-practice (Chironga,

et al. 2006). Specifically, there is a definitive need for more contextual scoping and scanning capability identified in the wine industry (Spies, 2007), with one of the key problems to building innovativeness and international competitiveness and developing the greater South African wine industry being recognized and acknowledged as inadequate, ineffective and inefficient research systems (South African Wine and Brandy Company, 2003).

Significantly then, although the available literature does present existent “wine” and “tourism” sector differentiated studies that acknowledge “wine tourism”, upon further review, they are revealed to be limited either in regularity, consistency, reliability or applicability for a “wine tourism” specific research orientation. And even though the general tourism sector has over recent years been receiving significant policy attention and publicity from governmental departments and agencies, especially in the buildup to South Africa’s hosting of the 2010 soccer world cup, (Dube, 2005; Schuurman, 2009), and furthermore despite wine tourism’s “potential” being specifically identified for the benefit of the Western Cape’s agricultural and wine sectors (Department of Economic Development and Tourism. 2004b); it is with some sense of irony that Visser & Rogerson, (2004: 201) indicatively note:

“whilst a number of rich tourism research investigations have been undertaken in the last decade, the observation made ten years ago by Cassim (1993 cited in Visser & Rogerson, 2004) still holds true that overall, ‘tourism research in South Africa is not well developed.’”

Summarily, the emphasis that the reviewed literature places on the evident vacuity of South African contextualized and wine tourism-specific research and industry conception supports the broad wine tourism management and development investigation undertaken by this study as captured in the five refined research questions. Moreover, the literature affirms the identified research problem of needing to find out what is going on in South African wine tourism, by underscoring the critical need and value of a greater comprehension and understanding of the current wine tourism system that this study endeavours to deliver.

2.3 A wine tourism development research framework

Tourism development in general, including wine tourism, can have multiple initial drivers and industrial stimulants, ranging from the presence of low-budget travellers galvanizing a locally-controlled (organic) development, to government established (induced) tourism (Cohen, 1983 cited in Skinner, 2000). As such, formal models of tourism development are difficult to present, as the determinant variables fluctuate and differ between each tourist destination and region. However, within the greater sphere of wine tourism research and literature, Butlers (1980) model of the hypothetical evolution of a tourist area provides a further conceptual framework with which to describe and analyze the development of wine regions with respect to wine tourism (Skinner, 2000).

Butler's Tourism Area Life Cycle model (TALC) is one of the most well cited models in tourism, but it remains a clear indicator of the importance of theory in tourism research (Hall & Sage, 2009). And although the TALC has been criticized on the grounds of it being difficult to operationalise and the variables being empirically difficult to define; the model remains helpful as a developmental indicator for industries such as local wine tourism and is evidently a useful organizational device to frame the level of general tourism development (Faulkner, 2003). The TALC model proposes that a tourism destination or product goes through several key stages:

- exploration (discovery),
- involvement,
- development,
- consolidation,
- stagnation, and
- decline and/or rejuvenation.

To further flesh out the TALC model in wine tourism terms, Table 2.2 (overleaf) provides a further explanation of the practical developmental characteristics and exemplifying traits of each of these various life-cycle stages, as hypothetically experienced in wine tourism communities and regions.

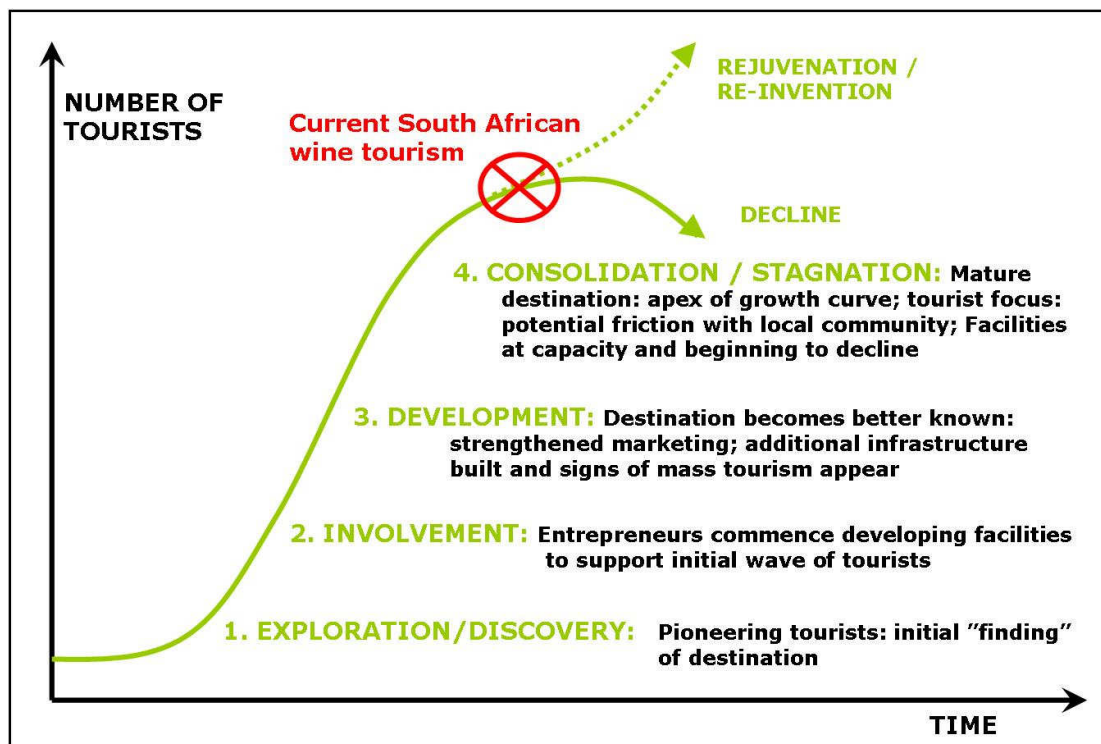
Table 2.2: Explanation of the Tourism Area Lifecycle model as applied to the South African wine tourism industry, 2009.

| | |
|---|--|
| 1. Exploration/Discovery | Wine appellation introduced - Rural existence Vineyards planted, Wineries developed. Pioneering enthusiasts visit |
| 2. Involvement | Wine writers take interest—wines start winning awards Number of tourists increase—still early adopters Some tasting opportunities emerge Some new buyers arrive for “wine country/lifestyle living” |
| 3. Development | Viticulture growth Area starts featuring in tourism / travel guides Seasonal tourism cycles start to apply Accommodation services and facilities grow Tasting opportunities integrated into most wineries Pioneer tourists begin to avoid the area |
| 4. Consolidation | Viticulture becomes area hallmark Guidebooks now focus on the area Mass tourism (bus trips) established Wineries increase size of vineyards Some vineyard consolidation Tourism overwhelms infrastructure – local residents opposed Tourism development removes land from agriculture Land prices start to exclude locals |
| 5. Stagnation | Urban development encroaches on viticulture Infrastructure upgrades required in area Substantial tourism continues Original community residents move out of area |
| 6. Decline | Area character is now urban: the wineland ‘magic’ is diminished or arguably gone Wineries have to “import grapes” Wine tourism begins to decline |
| 5. Cooperation (versus Stagnation) | Agricultural preserves established Development curtailed by town planning controls Wineries develop collaborative / integrated tourism plans to handle volume tourism Infrastructure selectively upgraded to ease tourism flows without compromising area’s character Increased communication between community, wine and tourism bodies and local / provincial government |
| 6. Conservation (versus Decline) | Sustainable winery / wine tourism development plan implemented to conserve the core character that facilitated original growth Viticulture region recognized internationally |

Source: Adapted from Bannister, 2005; Boonsong, 2006; Skinner, 2000.

The TALC model has been applied to numerous tourism product environments since its first proposal, however, more significantly for this research it has also been integrated into international wine tourism development studies (Alvares & Lourenco, 2005; Booker & Burgess, 2008; Boonsong, 2006; Dodd & Beverland, 2001; Skinner, 2000). The model has also previously been applied to the South African wine tourism industry to forge an understanding of theoretical tourism development, but moreover to offer a contextualized interpretation of the stage of development and potential future of the local industry (Bannister, 2005; Bruwer, 2007a). This South African wine tourism TALC is graphically depicted in Figure 2.1.

Figure 2.1: Hypothetical model of South African wine tourism evolution – the Tourism Area Life Cycle, 2009.



Source: Adapted from Bannister, 2005; Bruwer, 2007a; Booker & Burgess, 2008; Skinner, 2000.

As described in Table 2.2 and illustrated in Figure 2.1, the TALC indicates that a tourism destination or product (such as wine tourism) could initially enjoy varying levels of popularity, but over time, growth will follow an S-shaped path with a dip at the end (Booker & Burgess, 2008; Hall & Page, 2008). For South African wine tourism, Figure 2.2 also suggests a sequence of stages in the evolution of a tourism

destination or product that leads to a critical interaction of a range of capacity elements that determine a point of stagnation, where the industry is confronted by a combination of challenges that threaten its growth performance in the market place and therefore its longer term viability (Faulkner, 2003; Skinner, 2003). This postulation of South African wine tourism being within “consolidation/stagnation” stage of the TALC model (indicated by a red encircled “X”) is attributed to the local industry’s emergent congruence with typical characteristics and traits of this developmental life-cycle stage.

For although it is recognized as having “tremendous potential” (Bruwer, 2003: 423), the South African wine tourism industry is still evidently hampered by conciliatory and stagnating characteristics such as:

- developmental capacity restraints and management issues (Conningarth Economists, 2009; Frandsen 2005b),
- policy and funding disparities (Department of Economic Development and Tourism, 2004a; 2004b; 2005; 2006),
- lack of conceptual and industrial comprehension (Loubser, 2004; Gilfellan, et al. 2007), and
- stakeholder frustration and dissatisfaction (Biggs, et al. 2009; Le Roux, 2005; Van Zyl, 2005).

Furthermore, according to the TALC model, if the capacity limitations of the tourism destination or product are exceeded, stagnation or even possible decline is the expected result (Boyd, 2006); and unfortunately as is evident from available literature on South African wine tourism, such fragmentation of developmental capacity is a existent and tangible concern (de Kock, 2004; du Plessis, 2007).

Of particular relevance and applicability is Faulkner’s (2003: 35) suggestion that this developmental stagnation is symptomatic of a form of industrial “inertia”, where entrenched management and planning practices and structures, which may have succeeded in the past, have become progressively out-of-kilter with the changing developmental environment, and made stakeholders less sensitive and adaptable to the modern industrial setting. This inertia is usually reinforced by weaknesses of existing power relationships within the industry, and furthermore by the constraints imposed

by the mindsets, comfort zones and egos of key decision-makers. As such, communities, destinations and entrepreneurs need to understand and appreciate the fluidity of tourism markets, only if managers realize that the approaches of the past will not necessarily work in the future can the stagnation of industries such as wine tourism in South Africa be averted (Booker & Burgess, 2008).

Therefore the proposed TALC in Figure 2.1 reflects the passage of South African wine tourism through a series of stages that culminate in a critical turning point, at which the cumulative affect of various developmental capacity determinants, precipitates a developmental situation whereby wine tourism faces perceived stagnation and possible decline, unless there is a dramatic shift in management and planning approaches (Faulkner, 2003). This shift must invariably involve the adoption of more effective methods of strategic analysis, for it is arguable that the destination or industry would not be in such a precarious position if more effective methods had been employed in the past. This is of tremendous significance in the South African-specific wine tourism context of this study, particularly as it emphasizes the critical need for further in-depth developmental research and analysis at a management and systems level, such as is specifically captured in the evolved research questions,

2.4 South Africa: Sectoral development of composite industries

“In assessing the competitive position of a tourist destination and extrapolating this assessment to the consideration of future directions of development, and the strategic measures necessary to ensure competitiveness within the emerging environment, consideration needs to be given to how the destination evolved” (Faulkner, 2003: 34).

As suggested in the diverse and differentiated definition of wine tourism discussed previously, the historical emergence of “wine tourism” is associated with a convergence of the “wine” and “tourism” industries; and in South Africa these industries have a unique and complicated heritage. The following sub-sections therefore examine their key concepts and knowledge to provide a contextualized literary framework to outline historical development of wine tourism and thereby

provide the knowledge setting for this study to uncover how that historical context impinges upon modern wine tourism development in South Africa.

2.4.1 South African wine industry development

Although the first South African grapes were crushed in 1659, South Africa is internationally considered a “New World” wine producer. The wine industry was first formally organized in 1905 with the formation of co-operative wineries, which were designed and established upon the recommendation of a governmental commission of inquiry that was investigating the prevailing problem of over-production that characterized the wine market at the time (Cape Wine Academy, 2008). However, surplus production continued to dog the industry and following a devastating Phylloxera (vine root louse) outbreak, the escalating volatility of the wine industry culminated with South African wine farmers forming the Ko-operatiewe Wijnbouwers Vereniging van Zuid-Afrika, Beperkt (KWV) in 1918 (Le Roux, 2005).

The KWV introduced the South African wine industry to an age of regulation. The chief mandate was to stabilize South African wine prices and ensure that member farms received a suitable return on their grapes, and the influence and control of the KWV steadily grew over the subsequent years (Hands & Hughes, 2001). In 1924 the Wine and Spirit Control Act No. 5 required all South African wine producers to join the KWV and stipulated that the KWV could set the minimum prices for wine. Then in 1940, through the Wine and Spirit Control Act No. 23, all wine production and sales transactions in South Africa could only be conducted with the permission of the KWV. 1956 saw the further implementation of legislation by the South African government that allowed the KWV to impose a quota system that governed the number of vines that could be planted by farmers (Preston-Whyte, 2000; Van Zyl, 1987). And as a result of this strong government backing, during the apartheid years (1948 to 1994), the KWV acted as the regulatory body and agent for the entire South African wine industry; imposing regulated prices, plantings and quotas until deregulation, which occurred progressively between 1992 and 1997 (Chironga, et al. 2006).

These various KWV quotas and regulations, although benefiting the industry through price support, import protection and controls, which enabled producers to pass costs

on to the consumers (Sandrey & Vink, 2008), did however actually stifle innovation and entrepreneurship over the years (Le Roux, 2005), and it was not until the late 1960's that there was a producer led movement to amend these regulations (Demhardt, 2003). The South African government responded to the producer's requests by funding a program to promote wine to the South African public, in an effort to increase domestic consumption (Randle, 2004). However, the continued enforcement of prohibition laws that prevented wine tasting and sales on wine farms undermined these promotional efforts of the government.

Furthermore, the sanctions and international isolation of the subsequent apartheid years overshadowed, and indeed hampered, the South African wine industries developmental efforts (Demhardt, 2003). But when sanctions were lifted after the April 1994 democratic elections, the South African wine industry faced a new and strong challenge from "non-traditionalists" in the global market. These were the market-directed and innovation-driven New World wine producers who were gaining world wine market share with focussed brand building, consumer and costumer-responsive wine styles, and a strong service orientation (Dippenaar, 2004; Spies, 2002). Spies (2002: 6) poignantly further observes that in 1994 "the South African wine industry was not quite prepared for this new challenge".

As a result of the changes in the political dispensation since 1994, the South African wine industry has subsequently undergone major changes. Significantly, re-entering into the world economy after the extended isolation meant that South Africa's wine producers had a large amount of catching up to re-establish themselves as sellers of quality wine brands on the world markets. Moreover, there was a fundamental reorganization of the regulatory and institutional framework of the industry, mainly involving the role of KWV. As such, in 1997, the KWV was transformed into a public company and divested its statutory obligation to regulate the industry, ushering in a new era of deregulated wine marketing (Conningarth Consultants, 2001).

On a policy and legislative level, the wine industry also underwent considerable democratising. The previously marginalised labour force's rights were strengthened in the establishment of a minimum wage for the wine sector and furthermore in the ratification of the Extension of Security of Tenure Act 1997 (Ewert, Hamman,

Tregurtha, Vink, Visser & Williams, 1998). Aside from changes in labour policy, South Africa's agribusiness policy landscape has also been transformed by the country's land reform program, which consists of three main components: namely restitution, tenure reform, and redistribution. Restitution deals with historical land rights and the return thereof; tenure reform examines forms of land holding; and redistribution is focused on the transformation of existing racial biased land ownership pattern. However, land reform has been evidently slow in the wine industry, evidently widely attributed to budgetary constraints, lengthy and bureaucratic procedures and a general lack of willingness, which has lead to land reform falling short of targets (Tregurtha, 2005).

Summarily then, over the last 16 years the South African wine industry has gone through a 'triple transition' involving local industry deregulation, internationalisation and the politics of democratisation and legal reform (Ewert, 2005), which inherently places significant and new imperatives upon wine industry leadership and wine producers and farmers (Cape Wine Academy, 2008). And although there is widespread agreement that the re-introduction into the world markets has brought about tremendous opportunities for the South African wine industry, as reflected by the a significant increase in exports (South African Wine Industry Information and Systems, 2007; 2008), such international exposure has also put considerable pressure on the industry's competitiveness both locally and overseas. In the light of a highly regulated and controlled developmental past, the relatively recent international market and industry "openness" provides particular challenges to the development of the South African wine industry – at corporate, industrial and government levels (Esterhuizen & van Rooyen, 2006).

These challenges are financially exemplified in that the current South African wine industry is considered to be facing "unparalleled economic pressure and difficulties" (du Plessis, 2007). This fiscally adverse situation is quantitatively captured in the Deloitte and Touche (2005) wine industry benchmarking study where, of all smaller scale South African wineries with revenue of less than R25 million, 36% of them were making a loss. And of those with revenue between R25-90 million, 25% of them were also making a loss. By way of international comparison, the average profit in South African small wineries was reported at R13 per 9-litre case, while in Australia

the average profit was R20 (2005 prices and exchange rates) (Krige, 2005a). More recent 2009 data indicates that of the R24 average retail (shelf) price per 750ml bottle of South African wine, the producer at farm level receives only 44c; in drastic contrast to the R1.07 per bottle (i.e. 4% of retail price) that is considered to be the minimum amount required for a reasonable and justifiable entrepreneurs' remuneration and return on capital (Du Toit, 2009; Conningarth Consultants, 2009).

Compounding these challenges is that the South African government is also still in the process of defining its role in the wine industry. With competing policy priorities in post-apartheid South Africa, the government and various associated departments have struggled to find an appropriate level of re-engagement since the full deregulation of the wine industry in 1997 (Chironga, et al. 2006). There has also been considerable political and managerial controversy within the wine industry's central organisational structures, culminating in much publicised associative network breakdowns, high profile resignations and key company failures and dissolutions - all of which continues to contribute to a growing confusion over which organisation or body holistically represents the wine industry or if such a body even now exists (Castle, 2008; Ensor, 2008; Farmer's Weekly, 2008; Fridjhon, 2007; Grape, 2008; Hamlyn, 2007; Joint Press Statement, 2008; Morris, 2007a, 2007b, 2007c; Robbins, 2008).

From a broad perspective, when looking at these challenges and developmental events that have occurred and manifested in recent years, there are considerable questions as to whether South African wine producers can remain economically viable, particularly given that "local consumption of natural wine has in absolute volume terms declined" (Conningarth Consultants, 2009: 13), and that the number of primary grape producers has declined substantially since 1990 from a total of 4919 to 4501 producers in 2000 and 3839 producers in 2008 (Floris, 2009; South African Wine Industry Information and Systems, 2007 & 2008).

However, the South African wine industry currently maintains 112 700 hectares under vine (14th in the world), producing over 1 billion litres of wine (7th in the world) and collectively employs approximately 275 606 people. Therein, the local wine industry contributes an estimated R26,2 billion to the annual Gross Domestic Product of South

Africa (Conningarth Consultants, 2009; South African Wine Industry Information and Systems, 2008).

2.4.2 South African tourism industry development

In considering the historical development of tourism, it is important to note that of all the sectors of the South African economy, tourism was the most adversely affected by apartheid and subsequent international sanctions and isolation. Indeed, as a direct result of apartheid policies, the volume of international tourist flows was severely curtailed, leading to the closure of South African tourism promotion offices in many parts of the world. Moreover, apartheid legislation also circumscribed the potential of domestic tourism, as the majority black population had only limited access to tourism facilities and attractions. As such, under apartheid regime, the state of the tourism sector could be considered “anti-developmental” (Visser & Rogerson, 2004: 201).

Subsequent to the democratic change though, the situation has changed markedly and since 1994, South Africa has become more aware of the potential tourism has in contributing to the economic development of the country. In fact, the face of the tourism industry in South Africa was fundamentally changed by a period of tremendously strong growth in foreign tourist arrivals after 1990. With a small domestic market and less than 1 million annual foreign arrivals in the two decades before 1990, the national tourism industry has grown to over 9.5 million international visitors arrivals in 2008, with a further 32.9 million domestic trips undertaken (Cape Town Routes Unlimited, 2008a; 2008b; South African Tourism, 2007).

Currently with a strong average growth of 10.8%, the South African government has identified tourism as a strong pillar of economic growth (Schuurman, 2009). Tourism has been prioritised as one of five key economic growth sectors which the government intends to focus its efforts to encourage and support investment and facilitate growth (Mabudafhasi, 2008). However, in spite of the documented growth that has occurred in the general tourism industry of South Africa; there is mounting pressure on the industry to deliver on the perceived promises of economic empowerment and job creation (Allen & Brennan, 2004; Atos KPMG Consulting, 2004). Cornelissen (2005: 163) further suggests that South African tourism is in a “political economy of tourism production, consumption and regulation,” where the industry is shaped by its

interlocked dependence on the global structures of tourism production and local governance; which in South Africa thereby arguably results in a weakening of developmental and transformation goals.

Regardless though, the tourism industry in both provincial and national terms is clearly very large, with a multiplicity of stakeholders and role players. As such, in the last decade the industry has been a key focus of policy interventions of various sorts, ranging from overarching macroeconomic strategies at a national level to macro and microeconomic strategies at a provincial and city local level (Department of Economic Development and Tourism, 2004a). Delving further into the available such policy literature, the developmental character and situation of the South African tourism industry becomes more apparent.

2.4.3 Relevant developmental policy environment in South Africa

The White Paper on the Development and Promotion of Tourism is the overarching policy framework and guideline for tourism development in South Africa, denoting tourism as a lead sector within the national economic strategy and identifying it as an important force in the reconstruction and development efforts of the government (Department of Environmental Affairs and Tourism, 1996). The White Paper was developed through a lengthy consultative process that explored the advantages and constraints of promoting tourism development, emphasizing that tourism had largely been a missed opportunity for South Africa, prevalently (and relevant to wine tourism) noting that its development had been characterized by:

- inadequately resources and funding,
- inadequate tourism education, training and awareness
- insufficient infrastructure development,
- inadequate environmental protection,
- little integration of either local communities or previously neglected and disadvantaged groups,
- growing levels of crime and violence on visitors,
- a short-sighted private sector, and

- a lack of inclusive, effective national, provincial and local structures for the development, management and promotion of the tourism sector (Department of Environmental Affairs and Tourism, 1996).

The developmental concerns for the tourism industry are further elaborated upon in the Western Cape provincial policy documentation. The provincial White Paper on Sustainable Tourism Development and Promotion in the Western Cape specifically recognizes the recurring political and economic challenges of “transforming the society and economy of the province” as the key driving forces directing localised tourism development efforts (Department of Economic Affairs, Agriculture and Tourism, 2001). This guiding Western Cape White Paper centres around the recognition of the economic significance of tourism to the provincial economy, the importance of promoting sustainable tourism activities and attractions, and the promotion of co-ordinated tourism development (City of Cape Town, 2005); but moreover, the document also acknowledges (and gives significant insight into) the emergently fractured nature and extent of the tourism industry and its developmental history:

“Tourism in the Western Cape and its related components and activities have not been managed and developed in accordance with a clear, collective policy and strategy. As a result, the various components of the industry are largely uncoordinated and inwardly focused. This has resulted in ad hoc and fragmented strategies which failed to capitalise on our diverse tourism resources, thereby limiting the ability of the tourism sector to effectively provide much-needed entrepreneurship, employment and skills development opportunities” (Department of Economic Affairs, Agriculture and Tourism, 2001).

The developmental fragmentation concerns raised in the 2001 White Paper have remained prevalent as in the last five years they have been reaffirmed and supported in the more recent Western Cape Department of Economic Development and Tourism’s micro-economic strategies, research reports and syntheses. These documents identify that the national policy environment for industrial sector-specific support in South Africa has been characterized by a lack of intergovernmental coherence and engagement; resulting most relevantly and significantly for the development of industries such as tourism and wine in an undefined national

industrial development policy context. As a consequence of this unclear national developmental policy framework, it was evidently more difficult for provincial and local government to devise and implement relevant sectoral development and support policies, including wine and tourism, and thereby further contributing to the general lack of stakeholder clarity and common purpose in terms of government's role in industrial development (Department of Economic Development and Tourism, 2004a, 2004b; 2005; 2006).

However, more recently the national industrial development policy environment has progressively been further formalized. In August 2007, South Africa's Cabinet approved the Department of Trade and Industry's (DTI) long delayed national industrial strategy: the National Industrial Policy Framework (NIPF) along with its accompanying "plan of action," the Industrial Policy Action Plan (IPAP). The IPAP identifies four lead sectors that currently form the central focus for the implementation of NIPF, with clear programmes of direct action that include specific projects, desired outcomes, processes, engagement of other departments and specified timelines. The identified priority sectors are:

- Capital / transport equipment and metals,
- Automotive assembly and components,
- Chemicals, plastic fabrication and pharmaceuticals, and
- Forestry, pulp and paper, and furniture (Department of Trade and Industry, 2007).

What is immediately striking in terms of wine tourism though, is that none of the four lead sectors has a very significant presence in the Western Cape, which is the recognized provincial core of wine tourism, with 95 percent of the country's vineyards (Bruwer, 2003; Wines of South Africa, 2008). Furthermore, given that the DTI's capacities are widely acknowledged to be very constrained, it is likely that attention and resources will be almost entirely focused on these lead sectors for some considerable period to come, further suggesting that national state involvement and support for industries such as wine and indeed more specifically, wine tourism, will remain absent or de-prioritized for the conceivable future (Department of Economic Development and Tourism, 2007: 11).

2.4.4 Integrating wine and tourism: the importance of cooperation

Summarily, the available literature on the developmental history of the South African wine and tourism industries, collectively presents a heritage characterized by industrial and government protection, restrictive policies, international isolation, high reliance on private capital output and investment, considerable personal, political, organizational and legal conflicts, capacity limitations and shortfalls, a culture of inward self-preservation and a prevailing sense of internal competition punctuated with non-collaborative practices; thereby setting a significant frame of insight for this study's to research the problems limiting South African wine tourism development.

However, in the South African context, Demhardt, (2003) notes that in the Western Cape, both the wine and tourism industries have clearly manifested an interdependent industrial rise and expansion as an immediate result of the departure from the apartheid era. As such, it is thereby implied that the composite industry of South African "wine tourism" is arguably only 16 years old in 2010 (post 1994 democratic elections), which significantly underscores the value of the relatively "youthful" nature of the industry in its specific employment of more than 59 000 people and contribution of over R4.2 billion to the regional economy of the Western Cape (Conningarth Economists, 2009; Wines of South Africa, 2008).

Furthermore, as a representation of this integration of both the wine and tourism industries, it is clear that wine tourism does not exist in a vacuum - isolated from the various sectoral elements (Tourism New South Wales, 2001). On the contrary, the interaction and cooperation of wine and tourism service providers in a wine region is undisputedly considered to be at the core of the successes of international wine tourism destinations and regions (Charters & Carlsen, 2006; Economic Planning Group of Canada, 2001; Getz, 2000; Winemakers' Federation of Australia, 2002). Such cooperation is also widely deemed in the available local literature to be essential toward wine tourism's further development in South Africa (Biggs, et al. 2009; Bruwer, 2007b; Dube, 2005; Frandsen, 2005b; Le Roux, 2005; Loubser, 2004; Sleet, 2008b; Wine Tourism Strategic Workshop, 2009).

With regards to cooperation, the reviewed literature also highlights the proliferation of numerous operators, organisations and companies in both the wine and tourism

industries, and further emphasises how these sectoral representatives and stakeholders are not necessarily easy “to get together” (Macionis, 1997: 12). However, the critical importance of such coordination of these involved sectoral stakeholders through focussed partnerships and collaborations has expressly been identified as an ultimate determinant of the successful delivery of “wine tourism” (Dodd, 1995; Hashimoto & Telfer, 2003; Joint National Strategic Partnership, 2005; South Australian Tourism Commission, 2004).

2.4.5 Cooperation in wine tourism: A paradox of industrial paradigms

For wine farms and producers, it is evidently one of the paradoxes of successful wine tourism that wineries need to work together both formally and informally with their commercial rivals to establish advantageous connections as a strategically important means of obtaining trade (Telfer, 2001). This is counter-intuitive for many wine producers, particularly in the historical context, who otherwise purposefully seek to gain competitive advantage over their neighbours. But in terms of creating a critical tourist mass in wine regions, one wine producer or farm is unlikely to attract many visitors on its own. Therefore partnering and collaborating with other wine and tourism industry organisations and other complimentary activities within the region is evidently seen as vital in collectively attracting a greater number of visitors and investment (Cambourne, et al. 2000; Correia, Ascensão & Charters, 2004; Getz, 2000). *“Indeed, these links are essential, for wine on its own is unlikely to sustain the entire interest of a tourist”* (Correia, Ascensão & Charters, 2004: 17).

In a South African context, the Western Cape tourism industry is specifically identified as highly fragmented and competitive, with a documented lack of cooperation, primarily because regions within the province are concerned that they will give away their competitive advantage that has been built up over time, similar to the widespread uncooperative mentality of wine producer’s (Department of Economic Development and Tourism, 2004c). As such, effective cooperation is again emphasized as a vital part of increasing the institutional efficiency and efficacy of tourism agencies and critical to the building of the South African wine tourism industry’s developmental capacity (Frandsen, 2005b; Loubser, 2004; Wine Tourism Strategic Workshop, 2009).

For effectual and sustainable development in an industry such as wine tourism, a strong framework of collaboration and involvement between the wine and tourism stakeholders of government, local municipalities and private enterprises and associations is arguably one of the most important prerequisites evident in the relevant literature. Indeed, from the identified fragmentation of domestic competition within the wine and tourism industry literature and compounded by the growing pressure of international competition (Conningarth Consultants, 2009; Monitor Company Group, 2004; South African Tourism, 2007); it is imperative for successful South African wine tourism development that intense “cooperation”, as opposed to “competition”, be encouraged and facilitated between the variety of wine attractions and tourism suppliers (Rogerson, 2006). Such collaborative associations are fundamentally characterized by participating stakeholders being mutually dependent on resources controlled by others, albeit that they further recognise that there are advantages to be accrued from a collective pooling of resources (Meyer, 2004).

Summarily, there is a unanimous understanding in the literature that in order to maximise the development of wine tourism opportunities, stakeholders in the relevant communities (such as wineries, other local businesses, local authorities and state agencies), as well as the greater wine and tourism parent industry participants cannot operate in isolation. These stakeholders need to cultivate an environment of trust and working associative networks so to forge stable and beneficial relationships that allow the differentiated sectors to link themselves more critically to each other; thereby collectively integrating them as part of the main attraction of wine tourism (McRae-Williams, 2004; Rural Areas, People & Innovative Development, 2009).

Getz & Brown, (2006b: 155) offer this conclusion that summarises the literary platform that this sub-section sets for the developmental limitations research that this study pursues:

“Collaboration is needed to facilitate the wine tourism experience, involving destination marketing/management organizations, the wine and tourism industries, cultural and other recreational suppliers. [Wine tourism] is not a simple product to produce and refine... Wineries are the core attraction, but cannot stand alone.”

2.4.6 Primary wine tourism development manifestation: wine routes

Most notably in the reviewed literature, and specifically in wine tourism terms, the importance of cooperation across wine and tourism sectors as examined in the previous sub-section, is evidently exemplified in the intrinsic wine tourism phenomenon of “wine routes”; where coordination and cooperation is linked to a process of creating and leading new alliances between different private and public actors specializing in wine and touristic activities (Rural Areas, People & Innovative Development, 2009). Indeed, the topic of wine routes recurringly overwhelms the associated available literature on the development of the wine tourism industry, both in South Africa and abroad.

Wine routes are defined as basically “a tourist route that connects several wine estates and wineries in a given area” (Bruwer, 2003: 424). Gatti & Incerti (1997, cited in Brunori & Rossi, 2000: 410) offer a more explicit definition of a wine route as:

“a signposted itinerary, through a well defined area (region, province, denomination area) whose aim is the ‘discovery’ of the wine products in the region and the activities associated with it. This ‘discovery’ is carried out directly on the farms (enabling the traveller to meet the producer) and/or in the spaces specifically organised around the wine produced (wine tasting centres or wine museums).”

The significance of wine routes is immediately established in that even only a cursory investigation into wine tourism literature reveals a distinct and prevalent correlation between the development of the industry of wine tourism and wine routes themselves; in countries as diverse as:

- Australia (Getz, 2000, Macionis & Cambourne, 2000),
- Canada (Hashimoto & Telfer, 2003),
- Chile (Kunc, 2009; Sharples, 2002; Zamora & Lacoste, 2007),
- France, (Torturat, 2007),
- Greece (Tzimitra-Kalogianni, Papadaki-Klavdianou, Alexaki & Tsakiridou, 1999),
- Hungary (Szivas, 1999),
- Italy, (Brunori, G. & Rossi, A. 2000; Di Gregorio & Licari, 2006),
- Spain (Marzo-Navarro & Pedraja-Iglesias, 2009),

- New Zealand (Hall, 1996; Hall, Longo, Mitchell & Johnson, 2000; Hall & Mitchell, 2002),
- Portugal (Correia, Ascensão & Charters, 2004), and the
- United States (Boonsong, 2006; Wargenau & Che, 2006).

The earliest international records of formal wine routes or trails have been identified in the German tourism industry in the 1920s, namely the *Weinlehrpfad* or “instructional wine path” (Nowers, De Villiers & Myburgh, 2002: 197), although visits to vineyards have been recorded as part of organised travel since ancient Greek and Roman times (Vandyke Price, 1985). However, as is apparent from the literature, wine routes are now clearly a global phenomenon.

Wine routes are unanimously regarded in the reviewed literature as an essential ingredient in wine tourism development strategies and have become important international tourism and destination products, as well as acting as a tourism promotional tool for wine producing regions (Getz, 2000; Hashimoto & Telfer, 2003). Van Zyl (2005: 5) summarily asserts that the wine route phenomenon represents “the physical link between ‘wine’ and ‘tourism’”. As such, wine routes are evidently seen to be a primary contributor to both the development and promotion of regional wine tourism (Correia, Ascensão & Charters, 2004), thereby establishing “the best framework for cooperative work between government, private enterprises and associations, the tourism industry, wineries and the local council” (Bruwer, 2003: 425).

Wine routes evidently work as an “engine of development” (Brunori & Rossi, 2000: 421), which is recognised by its members, non-members, tourists and other interested stakeholders as not only representing, but also acting on behalf of, and speaking for the particular wine territory, so forming a productive factor that harnesses the energies of all involved with regional development for the benefit of creating jobs and economic and cultural development (Europäische Weinstrassen, 1999 cited in Bruwer, 2003).

2.4.7 Wine routes Genesis of South African wine tourism

Such is the extent of literary evidence and support for wine routes that indeed, wine routes emerge as an centrally significant core of this study's continuing development research. Most prevalent to this study is that in the available South African literature, the developmental history of South African wine tourism as a whole, has widely been coincided with the emergence and growth of wine routes (Bruwer, 2003; Demhardt, 2003; Le Roux 2005; Nowers, de Villiers & Myburgh, 2002; Preston-Whyte, 2000; Van Zyl, 2005). As such, this sub-section details and clarifies this evident historical literary emergence.

In the late 1960's and early 1970's, while the monopolistic power of the KWV (introduced previously) was intended to hedge against the overproduction of wine in South Africa and secure adequate income for wine producers, it is widely acknowledged in the South African literature to have also substantially discouraged entrepreneurial innovation in the wine industry (Chironga, et al. 2006; Spies, 2002; Le Roux, 2005; Preston-Whyte, 2000). However, it was three individual wine farmers from Stellenbosch (Niel Joubert from Spier, Frans Malan from Simonsig and Spatz Sperling from Delheim) who joined forces and embarked on a mission to try and get the government to change the liquor laws and wine controls of the time (Preston-Whyte, 2000).

The magnitude of this mission must not be under-estimated, as these farmers were effectively encouraging producers to challenge the two most powerful entities in their industries of livelihood – the government and the KWV. They were risking the possibility of provoking legal action and the potential cancellation of their bulk wine contracts, which would have effectively ruined them in financial terms, particularly within the context of the closed economy and sanctions of the protracted apartheid era.

After considerable and lengthy negotiations, the necessary legal and state obstacles were overcome and the first recognised step for the South African wine tourism industry was taken in the formation of the Stellenbosch Wine Route in 1971. Perceived as the “product of leadership, determination and endurance in the face of obdurate bureaucracy” (Preston-Whyte, 2000:106), it is this wine route that represents

the genesis of recognised “wine tourism” in South Africa (Bruwer, 2003; Le Roux, 2005; Scott, 2004; Van Zyl, 2005).

It has been argued that this particular “wine route” formalisation of wine tourism could as much be a product of innovation and opportunity, as it could be a product of the relevant wine producers and farmers personal opposition to the harsh legal and industry restrictions of the time (Randle, 2004). However, the primary significance remains emphasized in that all literary accounts are unanimous in recognising that the wine route phenomenon represents the official birth of wine tourism in South Africa. Also the prolonged legal negotiations the original founders had to undertake with state departments and agencies to change various liquor laws to allow a wine route to exist further emphasises the importance of the accomplishment. Particularly as the literature clearly describes how complex and difficult the diffusion of new ideas and practices was within the wine environment of the time (Preston-Whyte, 2000).

The basic objective of the original founders (Joubert, Malan and Sperling) and their efforts toward wine tourism, as embodied in the formation of the first wine route, was due to their identification of wine tourism activities as the ideal marketing tool for encouraging more visitors and improving wine sales (Le Roux, 2005; Rust, 1996; Van Zyl, 2005). And following the successful establishment, growth and popularity of the Stellenbosch Wine Route and in recognition of the positive impact it had on regional and rural tourism, a number of other wine routes were established over the following years in other South African wine regions.

Indeed, as time passed and more wine routes developed, the initial founding aim of selling wine directly to the tourist evolved into a dualistic objective that included regional branding and marketing (Nowers, de Villiers & Myburgh, 2002). The continuing sanctions and seclusion of the 1980's also further encouraged competition between South African wine regions for the all-important domestic tourism and wine market. And with the deregulation of the wine industry in the 1990's and no national wine tourism marketing or development strategy in place, nor any direct funding or support from the national or provincial government, wine routes then continued to establish themselves independently, each operating with their own organizational

structures, marketing plans and operational procedures with no industrial unity or collaboration.

Prevalently, up until 1997 the marketing of wine (like most sectors of agriculture in South Africa at the time) was extensively regulated by statute (Sandrey & Vink, 2008). And in the face of the decades of regulation and government protection, further compounded by years of isolation from international markets; the resultant upshot was that many wine producers and co-operatives knew nothing about wine marketing or branding (Ewert, 2005). Therefore, the wine route model which was initially part of progressive and entrepreneurial individual South African wine farmers and producer's wine of origin branding efforts, then further became the widely and rapidly adopted primary tool to attempt the greater marketing of wines and establish a regional identity.

2.5 Conceptual and practical application of wine tourism

Having framed the South African wine tourism developmental context within the greater wine and tourism industrial development setting and identified the primary stakeholders and contributors, such as wine farmers, producers and routes; the following section examines the available literature regarding the application of wine tourism within this industrial environment from both a conceptual and practical perspective, further clarifying the literary knowledge platform that this study's research builds upon.

2.5.1 Definitional subjectivity of engaging in wine tourism

As clearly revealed in the reviewed literature, the definition of wine tourism is complex and diverse, with multiple facets but can be generally divided into either a market-based definition; such as:

“the visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors” (Hall, et al. 2000: 3).

Or a more product and place orientated definition where:

“wine tourism embraces and includes a wide range of experiences built around tourist visitation to wineries and wine regions – including wine tasting, wine and food, the enjoyment of the regional environs, day trip or longer term recreation, and the experience of a range of cultural and lifestyle activities available in wine regions” (South Australian Tourism Commission, 2004: 4).

However, even with this evident complexity, these definitions still identify the key locations in which wine tourism occurs, and furthermore distinguish that the associated tourist visitations may be motivated by either the “grape wine” (wine and wine-related products) or the greater “winescape” (the attributes of a grape wine region) (Hall, et al. 2000: 3). There is an argument made though, that suggests that such encapsulating definitions are too restrictive and delimit the scope of wine tourism activities. Indeed, it has evidently emerged from the reviewed literature that winery and wine region visitors differ in terms of their interests, motivational priorities and expertise (Bruwer, 2007a; George, 2006; Getz & Brown, 2006b; Mitchell, Hall & McIntosh, 2000; Yuan, Cai, Morrison & Linton, 2005).

This then raises the definitional question of at what point does a “wine region visitor” become a “wine tourist” (Hall, et al. 2000)? For the attributes of a wine region that appeal to visitors in general, such as the scenery and environmental setting, may be quite unrelated to the consumption or purchase of wine. There have been studies conducted to access the motivations and inclinations of wine region visitors and the results suggest there are fundamental differences based on age, interest and even by nationality (Alant & Bruwer, 2004; Charters & Ali-Knight, 2002).

Thach (2007) summarises the overall international trends:

“The majority of visitors in New World wine regions such as the U.S., Australia, New Zealand and South Africa report that they are most interested in tasting wine, gaining knowledge, experiencing the wine setting and having fun. In the Old World, many Europeans report they visit wine regions such as Burgundy and Tuscany to enjoy the good restaurants and appreciate the architecture of the ancient wine villages. However, there are others around the globe who state that it is the romance and culture of wine that attracts them for an elegant get-away weekend. A smaller, but

growing majority provides reasons of agri- and eco-tourism to learn about grape growing, sustainable practices, and perhaps assist with the harvest as a primary motivation. Finally, there are those who cite the healthful aspect of wine as a rationale to expand their visits to wine regions”.

In terms of conceptually and practically defining the parameters of engaging in “wine tourism” then, the onus remains on the individual involved to distinguish whether or not a particular tourist action, visitation motivation or subsequent industry enterprise or offering warrants inclusion into the realm of applying or implementing “wine tourism”. This individual diversity and subjectivity of conceptual perspective is significantly prevalent in this study’s particular avenues of research and is further reviewed and elaborated upon in the following sub-section.

2.5.2 Diversity and scope of wine tourism resources

In terms of the identifiable employment and practical implementation of wine tourism as a composite industry and phenomenon, the literature reveals that manifestations and applications of wine tourism within a region can be as diverse as the regions themselves and the definitional perspective of each of the vested stakeholders.

From a supply point of view, the available literature provides a general but relevant insight for this study, on the resources utilised by tourists for the purpose of wine tourism, and the businesses and institutions which transform those resources into a wine tourism product. These resources comprise of:

- wine resources,
- tourism resources,
- human resources, and
- environmental resources.

The wine industry resources include wineries, winery associated amenities (e.g. cellars), vineyards and farm facilities, festivals and wine shows; while resources from the tourist industry include wine tours, accommodation and associated sectors such as the restaurant, hospitality, transport, retailing and catering industries (Cambourne, et al. 2000; Getz, 2000; Macionis & Cambourne, 1998; Scott, 2004). Human resources

include the wine producers and other viticultural and oenological workers as well as tour operators (Bruwer, 2007b; Gammack, 2006; Winemakers' Federation of Australia, 2002), while the surrounding environment includes infrastructure, the physical environment, scenery, regional cuisine and social and cultural components of the particular wine region, what Hall, et al. (2000: 9) call the "wine tourist terroir".

2.5.3 Developmental roles and linkages of wine tourism

There are also institutional and organizational arrangements which affect, influence and determine wine tourism development, including:

- all levels of government (departments and agencies) in terms of policy, legislation, regulation facilitation and planning frameworks,
- wine routes and regional associations, and
- the destination marketing and management organizations (Bruwer, 2003; Getz, 2000; Hall, et al. 2000; Wine Tourism Strategic Workshop. 2009).

However, in wine tourism development terms, it is worth considering that although many diverse businesses, associations and segments of the greater economy are recognised to benefit from the tourism aspects and elements of wine tourism, it is only those organisations with a direct relationship to tourists, and/or who actually perceive their customers to be tourists, which then become actively involved in fostering tourism development (Hall, et al. 2000). For example, there are many other businesses that benefit from tourists, such as food suppliers, petrol stations and retailers, sometimes described as 'allied industries', and in some cases, wineries. However, these businesses do not readily identify themselves as part of the "tourism" industry per se (Hall, 1998 cited in Hall, et al. 2000).

Therefore, significantly for this research study and particularly for proposing feasible actions to address the slow and disparate industry development concern; it emerged from the literature that in most circumstances, unless there is a direct perceived financial motive for wine businesses to create linkages with tourism businesses, it will often require some form of external inducement or facilitative incentive, such as the establishment of such linkages by government at no or minimal cost to the individual businesses. This thereby forges relationships between the wine and tourism industries,

creating an industrial platform on which the various stakeholders can engage in the diversity of wine tourism (Hall, Cambourne, Macionis & Johnson, 1998).

2.5.4 Balancing the scales: Considering the impacts of wine tourism

Given the evident multi-dimensional nature of wine tourism, a lot of emphasis and literature has been dedicated to the benefits and potential of the industry and its development (Cambourne, et al. 2000; Carlsen & Charters, 2006a; Getz, 2000; Morris, 2008; Olsen & Thach, 2008; O'Neill & Palmer, 2004; South Australian Tourism Commission. 2004; Wardman, 2007). The widely publicized advantages of wine tourism as identified in the literature can broadly be summarized as:

- opportunities for wineries and wine related businesses as a further sales outlet,
- improved consumer interaction and brand awareness and loyalty growth,
- increased employment opportunities,
- enhanced research, education and experience opportunities,
- diversification and strengthening the local economy,
- improved and expanded infrastructure, services and facilities for region, and
- a broader and improved social, cultural and lifestyle outlook for stakeholders.

However, from the international industry experience, there is severe and widespread competition evident in most wine tourism regions. As such, for many small and medium size wine producers in particular, these perceived benefits and advantages, have led to wine tourism being established as the “next step” for their respective agri-businesses, thereby diversifying their primary wine activities to develop additional income streams (Tourism Victoria, 2004; Winemakers’ Federation of Australia, 2008).

A major problem though, evidently faced by researchers and analysts is the difficulty in comparing wine regions and operations in terms of wine tourism as succinctly captured by Getz & Brown (2006a: 78):

“Enormous differences in age exist between Old and New World wine regions, and wine tourism developments vary from small-scale, family-based operations in remote, rural areas, to “cathedrals of wine” in intensely developed regions”.

A balanced consideration of wine tourism therefore needs to allow for the unique and diverse characteristics of wine regions by identifying that the identified potential and benefits of wine tourism do not universally apply to all wine territories.

2.5.5 Potential negative impacts of wine tourism

Despite the readily identified beneficial potential in the literature, wine tourism may not be an alternative for many wine producers, particularly due to the increased costs and management time requirements (Correia, Ascensão & Charters, 2004; Getz, 2000). Most prevalently, the construction, development and running of suitable facilities for hosting visitors may be prohibitively expensive for many farms and wine producers, particularly when it requires paid staff and especially as wine making in itself is already recognised as a capital intensive business (Alonso & Liu, 2010; Hall, et al. 2000). Compounding the cost issue is the evidently protracted time before a return on tourism investment is realised by wineries. And as such, some wine producers and wineries simply do not want to be involved in wine tourism, propagating the evidently held perception that offering tourist activities on a wine farm moves the vineyard manager away from a singular primary industry focus of crop management, to having to include a tertiary sector focus where customer service and sales skills are more critical (Fraser & Alonso, 2006).

It is clear then that although far less considered in the available wine tourism literature, there is evident cognizance of the potentially negative impacts of engaging in wine tourism activities and the development thereof. Hackett (1998, cited in Getz, 2000: 48) noted that because of their unique resource base, wine regions are frequently popular with tourists, property developers, and other agricultural utilizations. *“This leads to a shift from a mind-set associated with agricultural production to one in which rural residents view themselves and their countryside as being “consumed” by visitors within a service economy. Conflicts can result from the changing economic conditions as well as changes in self perception that accompanies wine tourism development.”*

Such a shift from a mindset of ‘production’ to a mindset of ‘consumption’ can fundamentally change what residents value and perceive as important in their own region and communities; distinctively shifting the patterns of development and policy

within local councils and municipalities (Griffith, 2007). This potential shift is aggravated in isolated rural areas (such as undeveloped wine regions), for it is argued that as the area opens up to tourism, the new influx of people influence and affect the culture and values of the existing community and residents (Hall, et al. 2000). And as tourism continues to grow, it is possible that the cultural or rural identity or “the sense of place” of the area could alter even further, extending beyond resident personalities and relationships, to the actual tangible and physical character of the town. Such a perceived loss of identity and place within a community may lead to a feeling of disenfranchisement or frustration, especially among long time residents (Griffith, 2007), potentially resulting in an exodus of the original populace, especially when coupled with the often exorbitant increases in the cost of real-estate that commonly occurs in wine regions as viticulture expands and tourism development grows (Alonso & Liu, 2010; Skinner, 2000).

This expanded development of wine tourism also raises a concern for the potential problem of “overdevelopment” or the “over-commercialisation” of wine regions. For as tourism development escalates, the coinciding changes it exerts inevitably become more intense and increasing in scope, which over time, transforms the overall amenity, culture and lifestyle of the destination (Craik, 1991, cited in Hall, Johnson & Mitchell, 2000). For example, in the case of Napa Valley, California, there are expressed concerns that the wine tourism development has resulted in the loss of some the destination-distinctive characteristics of the area, such as its scenic beauty, that originally made it desirable. It has even been suggested that wine tourism has become so successful that wine-making has now become merely a peripheral activity (Skinner, 2006).

For many smaller and rural wine region communities, the growth of wine tourism has in some cases lead to a number of other unwanted outcomes. One of the biggest issues is that of traffic, particularly where towns are ill equipped for a sudden influx of visitors (Poitras & Getz, 2006). Similarly to the stereotypical urban area traffic jam, congestion in rural areas is also frustrating, but is often perceived to be even more frustrating in rural areas because it is unexpected on the part of visitors and residents alike. And while traffic may not seem like a significantly negative detractor for wine tourism, it can potentially taint the rural or agricultural setting, and furthermore dilute

the character of wine regions that is generally expected by visitors and forms part of their ultimate attraction (Griffith, 2007).

Specialized international tourism research also points to several other possible problems or issues that may be experienced by wine tourism host communities. These include environmental issues such as:

- increased pollution,
- concerns for viticultural bio-security,
- the loss of agricultural land,
- altered landscape aesthetics, and
- increased pressure on natural resources like water.

The research also includes more diverse impacts such as growing tensions in the rural labour markets as a result of the importation of outside or migrant labour to meet developmental needs (Alonso & Liu, 2010; Getz, 2000; Griffith, 2007; Hall, 2003; Schollmeyer, 2006). Furthermore, the influx of migrant labour can also potentially overload local services and if they choose to remain in the area, their greater population may eventually lead to higher levels of unemployment, further exacerbating labour tensions (Skinner, 2000).

These negative impacts of wine tourism development are often small incremental effects that build over time, but they can lead to a cumulative degradation of the region's natural qualities (Martin & Williams, 2003). It is evident that care must be taken to protect the environment, rural beauty and sense of place of wineland areas and vineyards, so that the region maintains its inherent charm and attraction and reason to be a wine destination in the first place (Thach, 2007). Collectively, the negative impacts of wine tourism not only limit the capacity of wineries to provide positive tourism experiences for their patrons, but in altering the rural pastoral landscape of the wine regions, they can ultimately threaten to destroy the tourism product itself (Skinner, 2000).

Significantly for this study's management and development based research then, the emergent task facing South African wine regions and their respective leaders and

decision-makers, is to find a balance between desired levels of wine tourism development and minimising the potentially negative impacts that may seriously challenge the overall benefits of the wine tourism concept (Alonso & Liu, 2010).

2.6 Developmental systems, structures and leadership

Having presented and examined the definitional scope of wine tourism, its various industrial manifestations and the development thereof, this section specifically reviews the available literature on the definitional nature and extent of wine tourism related developmental initiatives and actions, and also the role of leadership in the industry, with particular reference to this study's research into management and responsibility.

2.6.1 Defining the concept of a developmental initiative

A development project or initiative, as an instrument of change (as it is often discussed in wine tourism literature), essentially aims to improve a situation over time through a particular set of interventions. Due to such development initiatives and projects often usually being focused on the flow of government funds and the possible mobilisation of private sector funds, it is these monetary flows that have often been regarded as the central and defining element in prevalent development initiative definitions and explanations.

However, a more contemporary view is that development projects and initiatives are in the first place “people-oriented” and that provision must be made for the associated dynamic elements of change over time (Verschoor, van Rooyen & D’Haese, 2005). In this context, a developmental project could then be defined as an intervention based on a proposal that deals with the technical, economic, social, organisational and managerial nature of that particular intervention; in this case the South African-specific nature of wine tourism development (Van Rooyen, Anadajayasekeram, Rukini, D’Haese, Marasas & D’Haese, 2002).

As such, Verschoor, van Rooyen & D'Haese (2005: 503) further emphatically stipulate that for a hypothetical development action, strategy or project to succeed in an industry such as wine tourism, *“production plans and managerial and organisational skills are required, input and output networks must be activated, demand must exist for the project output, and capacity development must occur”*.

2.6.2 The issue of leadership within wine tourism

Stemming from this examination and discussion of generic development initiatives and projects, one of the pertinent questions concerning wine tourism development and this study's research then becomes one of responsibility. Who should be generating, implementing and overseeing such developmental strategies, projects or interventions? Within the wider international wine tourism literature, such developmental responsibility conceptualization is most significantly evident in the evident literary issue of “leadership”.

Although it is apparent that wine tourism can and does indeed exist without significant strategic management and coordinated governance, as locally exemplified in South Africa, Getz (2000) unequivocally states that some form of guidance or leadership is necessary to forward sustainable development in the industry of wine tourism. Available South African literature also identifies a significant need for holistic leadership in wine tourism, however the issue of such leadership in wine tourism development is evidently not a simple affair to resolve, particularly in South Africa (Biggs, et al. 2009; Bruwer, 2003; Conningarth Consultants, 2009; Gilfellan, et al. 2009; Krige, 2005b; Loubser, 2004; Preston-Whyte, 2000).

The evolving nature of wine tourism inherently implies a similarly evolving conception of ownership, participation and collaboration at individual stakeholder, community and broader industry levels. As such, the significance of cooperation again emerges in that wine tourism must be agreed upon as a policy domain, where all legitimate stakeholders must be willing to participate for mutual benefit, thereby probably giving up some independence in the process. In terms of wine tourism leadership then, Dowling & Getz (2000) suggest that the coordination of such participation (leadership) comes from wineries, industry associations or government agencies. Poitras & Getz (2006: 443) further elaborate hereon by specifying that the

most appropriate “conveners” of this multi-stakeholder participatory dynamic of wine tourism are the local government and the wine industry.

For the South African context of this study, the developmental role of the wine industry has been identified and introduced. However, the evident literary suggestion of government leadership for wine tourism development has yet to be examined in the available literature and discussed in its orientation and support of the further research findings of this study.

2.6.3 The developmental role of government: International perspective

“In many parts of the world the role of government on wine tourism is substantial in terms of the creation of appellation controls, the establishment of health and safety regulations, planning regulations which affect what can be built and/or grown in certain locations, and the assistance which government may provide to support wine tourism infrastructure and networks” (Hall, et al. 2000: 9).

In the broader field of literature, there is considerable consensus for, and advocacy of direct government involvement for the successful development of wine tourism regions through:

- developmental funding,
- capacity and infrastructure support and facilitation,
- market and industry research conduction and management,
- suitable and specific policy formulation and implementation, and
- broad industry development strategy design and execution.

Such state investment and involvement in wine tourism is evident in countries such as Australia, Canada, Portugal, New Zealand and the United States (Barker, Lewis & Moran, 2001; Boonsong, 2006; Correia, Ascensão & Charters, 2004; Department of Tourism, Fair Trading and Wine Industry Development, 2004; Joint National Strategic Partnership, 2005; Martin & Williams, 2003; Sparks & Malady, 2006; Vaile, 2004; Winemakers’ Federation of Australia, 2002; 2009).

2.6.4 The developmental role of government: South African perspective

In contrast to these international wine countries, South African wine tourism is characterized by the evident absence of state recognition and involvement (Bannister, 2005; Bruwer, 2003; Du Plessis, 2007; Le Roux, 2005; Biggs, et al. 2009; Gilfellan, et al. 2009; Tassiopoulos, Nuntsu & Haydam, 2004). This scarcity of identified government involvement in wine tourism is particularly significant, as it exists despite clear and unequivocal tourism policy documentation of the South African government's defined public tourism development responsibility and functions that include:

- destination planning and policymaking,
- destination development and management,
- tourism product development,
- tourism training and capacity-building,
- coordination in respect of tourism matters,
- tourism research,
- provision of tourist infrastructure and services,
- tourism marketing strategy, planning, facilitation and implementation,
- tourism information provision, and
- regulation and monitoring (City of Cape Town, 2005; Department of Economic Development and Tourism, 2004a; Department of Environmental Affairs and Tourism, 1996).

Similarly to the tourism industry, the South African wine industry also explicitly identifies the South African government to play a crucial role as partner and stakeholder in the performance of the greater wine industry, including wine tourism at a national and regional level and through its appropriate agencies:.

“The role of government is vital in research and technology development, establishing the integrity of the industry, export promotion, infrastructure development, economic empowerment and social and human upliftment and will be highly relevant to facilitate and support the wine industry on its growth and development path” (South African Wine and Brandy Company, 2003: v).

Indicatively though, the South African wine industry currently receives little government support, specifically having to manage its own research funding, its own generic export promotion, most of its regulatory policing costs, its own levy collection, and its own training programs (Fridjhon, 2009).

However, the Micro-Economic Development Strategy for the Western Cape: Synthesis Report (Department of Economic Development and Tourism, 2006: 25) poignantly identified an “understandable” reluctance at national and inter-provincial government levels to support or subsidise such wine and tourism developments in the Western Cape. This is primarily because the Western Cape is as a whole considered to be comparatively much better off than other developing regions in South Africa (Department of Economic Development and Tourism, 2006).

However, despite this identified national government reluctance, the Western Cape provincial government does specifically acknowledge the need for some form of provincial tourism support for Western Cape district municipalities and local authorities, who lack the capacity to develop tourism-related business plans and implement strategy (Department of Economic Development and Tourism. 2004a).

2.6.5 Considering the issue of developmental responsibility in wine tourism

Of particular relevance to South African wine tourism and the research findings of this study, the Australian Review of Wine Tourism and Wine Exports raises some insightful considerations concerning the role and responsibility of government introduced in the previous sub-section.

It states that in order for an industry such as wine tourism to make a case promoting government intervention to improve efficiency, or to change the way resources are used in the wine tourism economy, the industry must firstly demonstrate a relevant “market failure” (ACIL Consulting, 2002: 7). This means demonstrating circumstances in which the market, if left to its own devices, cannot come up with a set of outcomes which maximises its overall efficiency.

Significantly then, if indeed government does intervene to correct the alleged market failure, the “optimal outcome” is generally in the eye of the beholder, emphasizing the subjectivity inherent in stakeholder perspective on wine tourism where one person’s market failure is another person’s perfectly predictable and sensible market outcome.

Furthermore, such a perceived market failure may well be replaced by an even more costly “government failure”, such as well intentioned but ultimately counter-productive efforts by governments that get in the way of existing private sector initiatives, making life harder for all concerned (ACIL Consulting, 2002: 7). Perhaps more importantly though for consideration in the South African industry, is that there is also the possibility of existing government interventions that are actually impeding business success in the specific area or industry, such as regulations or policies, which may be misguided or inconsistent.

Within wine tourism then, it is clearly apparent that developmental responsibility is a contentious issue. Indeed, it has been specifically identified that the industry has not developed thus far on the back of government aid or assistance “*and many, perhaps most, wine businesses would prefer Governments to keep a respectful distance from their day-to-day operations*” (ACIL Consulting, 2002: 7). This is emphasised in the South African context, with wine tourism development evidently having been attributed to the individual efforts of local wine farmers and producers, despite a revealed absence of official government backing in the literature (Department of Economic Development and Tourism, 2004a; Loubser, 2004; MediaVision, 2006).

However, such private, non-government facilitated development reaffirms the noted importance of the local wine industry in establishing developmental leadership and an associated responsibility as part of their intrinsic contribution to the wine tourism environment and experience. Summarily though, the available literature is clear that more regional policy research and broad-based industry cooperation (public and private sectors) are needed if government institutions are to contribute to wine tourism’s development in a proactive and enduring way (Martin & Williams, 2003). The importance of cooperation is again herein emphasized, with the active involvement and input of stakeholders and partners from all levels of wine tourism

multiple definitional scope deemed essential for sustainable development (Carlsen & Charters, 2006b; Getz, 2000; Rogerson, 2006).

Although there is an overwhelming amount of media conjecture and stakeholder opinion over the question of wine tourism development and management responsibility in South Africa, the available literature does evidently identify government, wine routes, wine producers and tourism marketing agencies as specific central role-players (Bannister, 2005; Bruwer, 2007b; Biggs, et al. 2009; Gilfellan, et al. 2009; Le Roux, 2005; Wine Tourism Strategic Workshop. 2009). But more specifically for this study's research though, the reviewed literature emphasizes how the diverse and evolving nature and extent of wine tourism, the individual nuances of each wine region's character and the varied relationships of stakeholders evidently combine to complicate the delimitation of a singular agent or entity of responsibility.

Faulkner (2002: 17) concludes by again highlighting the importance of full stakeholder input and cooperation for development in industries such as wine tourism: *"The way forward for travel and tourism is to create strong partnerships between the private and public sectors, non-government organizations, institutional bodies and local communities, in order to ensure effective active participation by all stakeholders. Governments are only just beginning to take a more decisive role in developing sustainable, economically successful tourism. But, strong partnerships by all players will bring valuable networking processes, workable policies and logical planning and development"*.

2.7 Conclusion

From this review it is clear that wine tourism development is a dynamic concept and phenomenon, for it occurs in evidently changing and varied local and international scenarios. As such, it is apparent that each wine region's unique characteristics in terms of environment, developmental stages, infrastructure, tourism development, and production and consumption markets makes the rendering of any broad concepts, or even speculations, very difficult (Alonso & Liu, 2010).

However, the literature review has revealed key ideas that lay a significant knowledge platform for the research findings of this study that are discussed and analyzed in the following chapter, thereby offering a supportive, motivating and affirming literary framework for each of the emergent and refined research questions.

As such, from the literature several key issues are prevalent and offer a contextual framework for the research findings of the following chapter. These can be structured with the applicable emergent research question as follows:

- the scarcity and value of wine tourism research at all levels of the South African industry (significant to all the RQ's),
- the prevailing subjectivity and lack of uniformed understanding of wine tourism (significant to all the RQ's),
- the difficult and conflicted historical integration of the divided local wine and tourism sectors (RQ1, RQ2, RQ5),
- the historically restrictive and prevalently unconstructive state and provincial policy environment (RQ1, RQ5),
- the unclear and undefined developmental role of government (RQ2, RQ3),
- to the emergent developmental importance of wine routes (significant to all the RQ's), and
- the revealed significance of industry participant partnerships and cooperation (RQ4, RQ5).

Within this literary framework this chapter has presented the evident literary concepts, issues and considerations pertinent to the exploration of wine tourism development in general, but more specifically it has introduced and clarified the relevant body of literature and the research context of the South African wine tourism setting, within which the research results of this study are found.

As such, with the literature examined and reviewed within the broader body of existent knowledge, particular emphasis has been paid to contextualising the nature and extent of the existent developmental research, conceptions, models and perspectives and the industry structure and policy environment of wine tourism, reflecting the management practice and development focus of this research and the

academic programme under which it falls. And so in establishing this body of work on the topic of wine tourism development in South Africa and relating it within a local and international research background, the key conceptions of the research and subsequent findings in the following chapter are contextualised, clarified and rationalised.

"There is no back label with a story on a beer can."

Ely Callaway (Ecask, 2007).

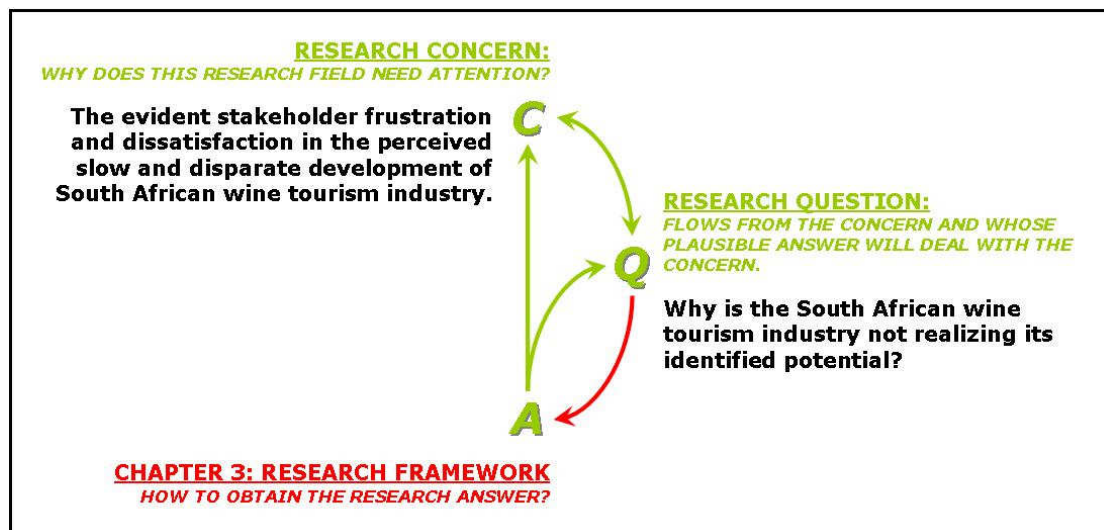
CHAPTER 3

OPENING THE BOTTLE: RESEARCH FRAMEWORK

3.1 Introduction

The purpose of this chapter is to describe, justify and evaluate the research process undertaken in this study. The central thesis of research concern, research question and research answer (Figure 3.1 below), and their fundamental research linkages that underlies the entire study will be further specifically clarified and explained by providing a methodological overview of the research process that was followed to generate research results and findings that would address and help to solve the research concern of evident frustration and dissatisfaction in the perceived slow and disparate South African wine tourism development by providing answers to the research question of why is the South African wine tourism industry not realizing its identified potential?

Figure 3.1: The position and role of the research framework in the central thesis of the study.



This chapter begins with a description of the selected scientific research paradigm, methodology and approaches used in the generation and realisation of this final dissertation. In the sections that follow, the selection and application of a critical

realist perspective and grounded theory methodology is explained and justified. The data collection, analysis and theory generation strategies and processes are also described, motivated and considered for their various strengths and weaknesses and the chapter concludes with an synthesis of the entire research framework as applied and pursued in this study.

3.2 The Research Methodology

The literature review of the Chapter 2 highlighted the evident need to construct a comprehensive and accurate picture of the situation in the South African wine tourism development, and in any investigation the researcher is inherently required to choose a research paradigm or perspective that best suits the nature of the inquiry being conducted. For a specific research situation and setting such as South African wine tourism development, qualitative research is considered particularly appropriate, as the nature of the problem requires diagnosing and exploring, or more emphatically, there is a need to understand the phenomena and discover its key dimensions (Hever, 2005).

However, qualitative research is a very broad category of research with a multitude of diverse paradigms with their respective ontologies, epistemologies, research methods and applications. So to clarify, the following sub-sections describe the exploratory qualitative research framework that this study was conducted within, specifically introducing the selected research perspective of Critical Realism, and the research methodology of Grounded Theory; further justifying their suitability and explaining their application to this research field.

3.2.1 Introduction to Critical Realism

The concept of “Realism” fundamentally states that things exist and act independently of human description, but that we as researchers and citizens of reality can only know things when they are put into particular descriptions (Sanghera, 2008). Critical Realism, the scientific paradigm used in this study, is a realist philosophy developed by Roy Bhaskar and claims that reality is actually socially constructed, whilst

maintaining that social arrangements and understandings are indeed determined by underlying structures and mechanisms of the “real” world (Plant, 2001).

“[Critical realism] assumes that actual events have real causes, but that empirical understandings of such real causes are only possible through observations of actual events. Furthermore, while actual events and their real causes are constant over time, empirical understandings are dynamic and change as methodologies and methods become more sophisticated, or as bodies of knowledge develop to provide more complete insights” (Weed, 2009: 508-509).

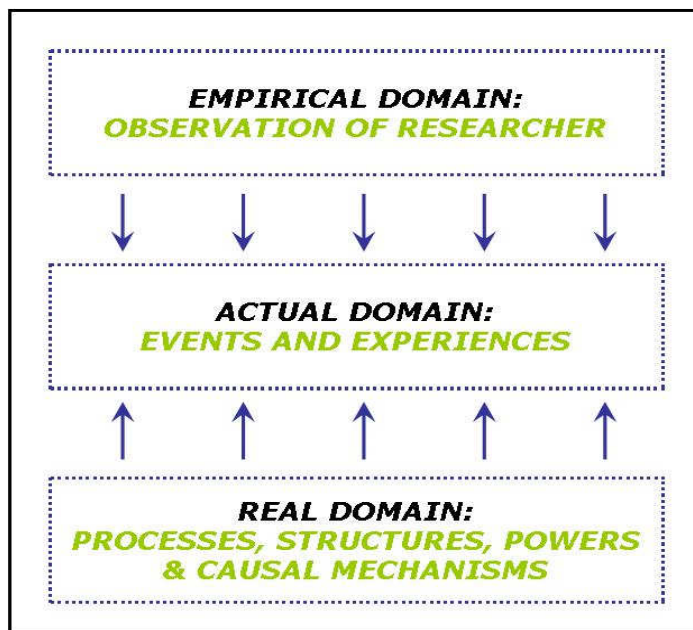
This may seem confusing to someone not familiar with the critical realist paradigm but Bhaskar provides an understanding by using the term *ontological stratification* to describe the three overlapping domains of reality that critical realism advocates: the domains of the *real*, the *actual* and the *empirical*:

- the empirical domain is made up of experiences and events identified through observations;
- the actual domain includes events and experiences whether observed or not;
- and the real domain consists of the processes, structures, powers and causal mechanisms that generate the events and experiences (Sanghera, 2008).

Figure 3.2 (overleaf) illustrates this stratified ontology of the three critical realism domains of reality.

Critical realism’s theory of the world is that there are mechanisms in the real world that possess various causal powers producing events that may or may not be experienced directly by individual or researcher (Plant, 2001). These causal mechanisms are processes to which causal properties may be attributed and are driven by the internal and external behaviour of actors and their interactions, where actors include people, organizations and institutions, and inanimate objects as passive actors (Stinchcombe, 1991). These causal mechanisms are considered to offer considerable potential for developing plausible explanations of what is actually going on in the world (Buttriss, 2005).

Figure 3.2: The stratified ontology of critical realism.



Source: Adapted from Ryan, 2009a.

So with the ontology for critical realism in mind; the epistemology (or theory of knowledge) can then be described as built upon the models of the researcher's understanding of the structures and mechanisms that, were they to act and exist in the postulated way, would account for the phenomena (wine tourism development) being examined (Blaikie, 1993). As such, by adopting a retro-ductive research strategy, the epistemology of critical realism therefore has three steps:

- Beginning in the domain of the actual, the researcher firstly observes connections between phenomena. The task is then to explain why such connections or relationships occur.
- Secondly, the researcher postulates the existence of real structures and mechanisms (in the real domain), which if they did indeed exist would explain the identified relationship and/or connection.
- The third step is for the researcher to attempt to demonstrate the existence and operation of these structures and mechanisms. This represents the central problem for critical realists though, as given that the hypothesised structures and mechanisms are not immediately available to experience, establishing their plausibility is difficult (Sanghera, 2008).

With cognizance of this brief introduction to critical realism, the following subsection will examine and motivate the reasons for this paradigm's selection as this study's research perspective, or ontology.

3.2.2 The motivation for using Critical Realism

As the main concern of this research is to understand the seemingly complex phenomena of wine tourism development, critical realism appropriately holds that this unresearched South African "reality" can be grasped by tracing the origins of experience (empirical) through to the level of events (actual), and then to underlying structures and processes (real). This stratification of reality efforts a two-fold philosophical integration; firstly by avoiding the conceptual breaks in the thinking associated with the narrowly calculative rationality of positivism (that treats knowledge as simply the accumulation of sense-experiences); while secondly recognising the limitations of strong forms of constructivism (that assumes that reality is simply dependent on our cognitive choices) (Plant, 2001).

In explaining a phenomenon such as that of development in wine tourism, critical realism emphasizes its suitability as an ontology for this study by delving further than merely identifying and showing instances of well-established regularities. Instead, critical realist researchers attempt to discover the necessary connections between phenomena, by acquiring knowledge of the underlying structures and mechanisms at work. By seeking these causal mechanisms through the employment of this critical realist perspective, stakeholders can achieve an understanding beyond the mere appearances of things, thereby providing an insight and knowledge of their nature and essences (Sanghera, 2008).

For an evidently under-researched, misunderstood and fragmented industry such as wine tourism in South Africa, it is important that it be investigated as an integral system. The critical realism perspective offers suitable support hereto by suggesting that such study fields be researched as a whole, uncovering all their necessary interconnections, not just isolated fragments torn out of context. *"Things have to be seen in their movement and interconnections. The parts cannot be correctly understood apart from their relationship with the whole"* (Patomäki & Wight, 2004). By reinforcing this holistic systematic view, critical realism offers a suitable ontology

for investigations such as this which are currently lacking in the South African wine tourism research context.

A final consideration for the use of critical realism is the issue of values. Values are particularly important in researching South African wine tourism due to the large number and diversity of stakeholders, each representing a different involvement, perspective, experience and value-set. The scale of this diversity as introduced in Chapter 2 underscores how many different values are indeed prevalent in the industry, including political, economic and family ideals, motivations and considerations. It is therefore vital to consider the impact hereof, and critical realism is considered to do so by reconnecting the world of ethical deliberation with the world of real causal processes. In other words, critical realism highlights that the manner in which we act in this world is as a combined result of the knowledge we possess, of that which we value and of that which we can do (Patomäki & Wight, 2004).

Having described and considered the motivations for adopting critical realism as the ontological perspective for investigating South African wine tourism development, the following sub-sections introduce and describe the research methodology used in this study.

3.2.3 Introduction to Grounded Theory

“Grounded theory” was originally proposed by Barney Glaser and Anselm Strauss in 1967, initially developed as a reaction to the failure of quantitative sociology to capture what Plewes (2002: 3) calls the “lived experience”. Glaser and Strauss felt a need to provide a counterbalance to the dominance of the ‘doctrinaire’ concern in sociology with the rigorous verification of logically derived theories, which had allowed the persistence of an embarrassing gap to be perceived between theory and empirical research (Partington, 2000). Grounded theory thus offered a practical method for conducting research that focused on the interpretive process, specifically by analyzing the “actual production of meanings and concepts used by social actors in real settings” (Gepart, 2004: 457).

According to Pandit (1996) there are three basic elements of grounded theory:

- concepts,
- categories, and
- propositions.

“Concepts” are the basic units of analysis, with Pandit (1996) further arguing that it is indeed from conceptualisation of data, not the actual data per se, that theory is developed. The second elements of grounded theory, namely “categories”, are higher in level and more abstract than the concepts they represent. Categories are the “cornerstones” of developing theory and provide the means by which the theory can be integrated. The third element of grounded theory is “propositions”, which indicate generalised relationships between a category and its concepts and between discrete categories.

Strauss and Corbin (1990: 23) further explain a grounded theory as

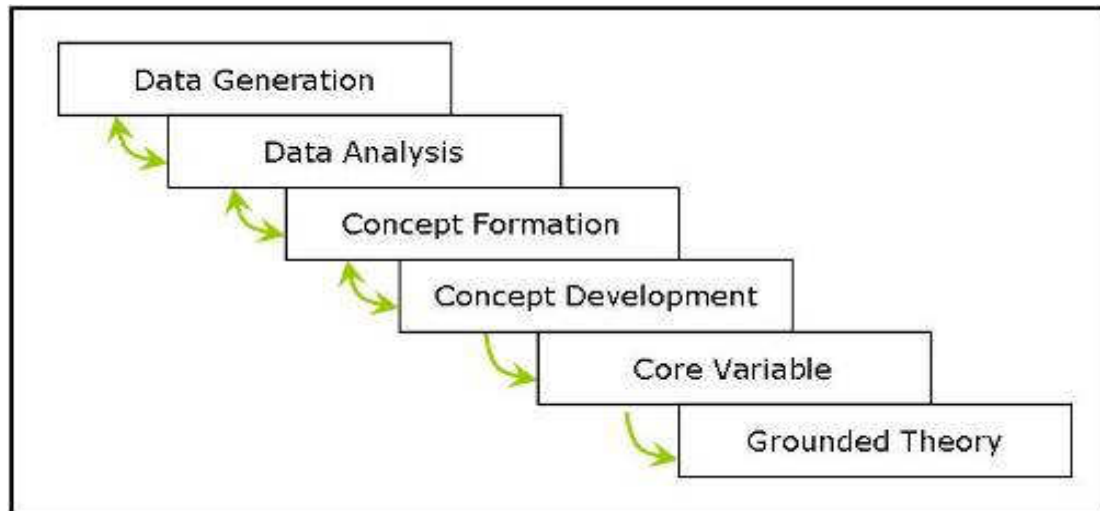
“...one that is inductively derived from the study of the phenomenon it represents. That is, it is discovered, developed, and provisionally verified through systematic data collection and analysis of data pertaining to that phenomenon. Therefore, data collection, analysis, and theory stand in reciprocal relationship with each other. One does not begin with a theory, then prove it. Rather, one begins with an area of study and what is relevant to that area is allowed to emerge.”

However, the task of offering a simple and thorough definitional explanation of grounded theory is challenging, as it is evidently a method that occurs sequentially, subsequently, simultaneously, serendipitously and in a scheduled manner (Glaser, 1998). It is therefore an extensive and systematic general methodology, where actions and concepts can be interrelated with other actions and concepts and crucially, nothing happens in a vacuum. Simply put, in grounded theory everything is integrated (Fernandez, 2004).

This integrated nature can be understood in the sequence of the grounded theory procedures, and Figure 3.3 (overleaf) outlines the key inter-related, simultaneous and over-lapping procedures in a general framework (the specific procedural steps and

process undertaken within this framework for this study are described and detailed in section 3.4).

Figure 3.3: Sequential framework of key grounded theory procedures.



Source: Adapted from Ryan, 2006; Struebert & Carpenter, 1999.

Most importantly in grasping and understanding grounded theory though, is to recognize that the research does not begin with a particular theory or hypothesis, but rather that essential constructs are identified from the data generated by the researcher and it is from this data that theory emerges (Struebert & Carpenter, 1999). And because the information pertinent to the emerging theory comes directly from the data, the generated theory remains connected to or grounded in the data, hence the “grounded” name (Glaser & Strauss, 1967; Stern, 1980; Strauss & Corbin, 1990).

At this point, grounded theory may appear to be complex and confusing, especially to those being introduced to it for the first time. To facilitate the comprehension of this methodology though, it may be helpful to identify the differences between grounded theory and other qualitative methodologies. There are five distinct distinguishing differences:

- The conceptual framework of grounded theory is generated from the data rather than from previous studies.
- The researcher attempts to discover dominant processes in the social scene rather than describe the unit under investigation.

- The researcher compares all data with all other data.
- The researcher may modify data collection according to the advancing theory; that is, the researcher drops false leads or asks more penetrating questions as needed.
- The investigator examines data as they arrive, and begins to code, categorize, conceptualize, and write the first few thoughts concerning the research report almost from the beginning of the study, (Stern, 1980).

However, in introducing and comprehending the fundamentals of the grounded theory methodology, one also has to consider that a singular definitional notion of “grounded theory” is evidently somewhat problematic.

Although Glaser and Strauss (1967) are credited with initially creating grounded theory, Strauss and another author, Corbin (1990) later made significant changes to the methodology (Pauleen & Yoong, 2004). Unfortunately, as a result the original proponents of the methodology (Glaser and Strauss) subsequently advanced differing views on how to develop “grounded theory”, namely the “Glaserian” and the “Straussian” approaches (Fischer & Otnes, 2006). At the root of this approach argument is the ongoing debate over the extent to which it is desirable or possible to pin down and formalise “grounded theory” as a general procedure (Partington, 2000), with specific concern over forcing the development of theory versus allowing the theory to emerge (Buckley & Waring, 2005; Locke, 2001).

Parker and Roffey (1997: 224) sum up this grounded theory approach conflict:

“...the intending grounded theory researcher is left with a primary choice between Glaser’s advocacy of a less specific analytical approach, and Strauss’ and Corbin’s provision of more detailed operational guidelines. The latter do offer great potential assistance to the field researcher, who must nevertheless take particular care to avoid “forcing” or imposing concepts that reflect the researcher’s own predispositions rather than those emerging from interaction with the study site and its participants.”

As such, Onions (2006) points out that researchers wishing to utilise the grounded theory method are almost obliged to debate and choose sides, rather than devote

valuable resources to their actual research or to evolving the methodology. However, although this procedural argument over grounded theory currently continues, both of the co-originators, Glaser and Strauss, have evidently remained largely faithful to their original philosophical assumptions and goals (Fischer & Otnes, 2006). Moreover, the expressed differences in the protracted and often acrimonious grounded theory divergence need not necessarily have a substantial effect on the explanatory constructs developed during a grounded theory study (Parker & Roffey, 1997). Indeed, both authors recognise that the research process is a highly personal iterative procedure, emphasising that successful grounded theory research does not necessarily lie in the following of procedures, but rather comes from a combination of the researcher's innate ability to conceptualise and formulate theories from their personality and temperament and from knowledge of the particular field of research (Partington, 2000).

Ultimately though, the grounded theory approach is not expected to be rigid and prescriptive; however, there must clearly be some central tenets (Gurd, 2004).

3.2.4 The canons of Grounded Theory

As such, Gurd (2008) identifies that the generation of grounded theory remains built upon four undisputed canons:

- Data Collection and Analysis,
- Theoretical Sampling,
- Constant Comparison, and
- Explanation.

The first of these “uncontested” canons is that grounded theory is an iterative process of *data collection and analysis* (Gurd, 2008: 127). According to this key tenet, a researcher who collects all of their data and then starts to analyse it is not using the grounded theory method. As such, grounded theory research characteristically and definitively involves an interactional process of data collection and simultaneous analysis that continues to the fullest extent possible (Goulding, 2005; Gurd, 2008).

The second canon is that of *theoretical sampling*, in which decisions about which data should be collected next are determined by the theory that is being constructed (Suddaby, 2006). For in grounded theory, the process of data gathering is driven by the developing theory, with new data collected based on the emerging categories and concepts.

“The concept of theoretical sampling is critical to all approaches to grounded theory – for without it the grounded theorist argues there can be no closure in theory building” (Gurd, 2008: 128).

The third canon refers to the constant comparative method in which data is collected and analyzed at the same time (Suddaby, 2006). *Constant comparison* is another fundamental characteristic of grounded theory, concerned with identifying, comparing and integrating emergent categories, properties, patterns and relationships in the data (Struebert & Carpenter, 1999). It continues throughout the grounded theory process, enriching the developing theory (Gurd, 2008).

The fourth and final undisputed canon is the *explanation* of the coding and theory building process used by the researcher. This canon is a critical element to distinguishing the differences between the Glaserian and Straussian approaches to grounded theory as introduced earlier, for the “explanation” describes the journey of data analysis and theory construction undertaken by the researcher and is ultimately the critical determinant of the acceptance of the research in the eyes of the reader (Gurd, 2008).

In addition to these undisputed canons, two other features are also worth including in this consideration of the analytic approach of grounded theory. The first is *theoretical sensitivity*, which describes the researcher’s insightful attributes. Specifically, this refers to the ability of the researcher to give meaning to data, their capability to separate the pertinent from that which isn’t, and their capacity to discern and understand (Strauss & Corbin, 1990). The second feature, *theoretical saturation*, refers to the point in the research process where the main concern of the research is accounted for and further sampling fails to add significant value to the study (Fernandez, 2004).

Having now briefly outlined the grounded theory methodology, the following section will examine the reasons and motivations for selecting it as the research methodology utilized in this study and consider its suitability.

3.2.5 The motivation for using Grounded Theory

Although it is argued that grounded theory flies in the face of the positivist assumptions of how research should be done, specifically the separation of data collection and data analysis; the grounded theory methodology offers a compromise between extreme empiricism and complete relativism, by articulating a middle ground in which systematic data collection can be used to develop theories that address the interpretive realities of actors in social settings as introduced in the previous section. But in introducing a motivation for using grounded theory in this research, it is important to acknowledge that it not a universally applicable methodology, and is more appropriate for certain research avenues and questions than others (Suddaby, 2006).

The use of grounded theory is generally considered most appropriate where researchers have a field of interest without explanation, from which they wish to discover theory from the data (Suddaby, 2006). Several key research scenarios to which grounded theory is particularly suitable are described in grounded theory literature:

- where there is little previous research in an area (Goulding, 2005),
- where there is comparatively little known about a phenomenon, or to provide a “fresh slant” on existing knowledge (Goulding, 1998),
- where the process of change is being investigated (Lye, 2005),
- where it is necessary to go behind the scenes to explain the development of a phenomenon (Kirk & van Staden, 2001),
- when the focus is on human experience and interaction and there is a high degree of applicability to practice (Paulene, Corbitt & Yoong, 2007), and
- in new situations or gaining a new point of view in familiar settings (Gurd, 2008)

As evident and emphasized in the previous chapters, these scenarios collectively refer to identified features and characteristics of the relatively young and developing South African wine tourism industry. So by allowing the researcher to go beyond current conjecture and the existing preconceptions of stakeholders, grounded theory presents an accordingly appropriate methodology for this study, particularly as it encourages the discovery of the underlying processes of “what is going on” in the research field (Glaser, 1994: 4), congruent with the primary research question of this study.

Grounded theory’s appropriateness is further emphasized for exploratory studies such as this one, as it enables flexible and detailed in-depth study of issues that are unconstrained by predetermined categories of analysis (Kirk & van Staden, 2001). Importantly for researching the local wine tourism industry, the results of grounded theory research are not presupposed, nor are the content or process of the research forced into fixed theories or pre-existing structures (Patton, 2002). As such, the rigours of the grounded theory methodology force the researcher to look beyond the superficially apparent; apply every possible interpretation before developing their final concepts and theories and to then demonstrate these through considered explication and data supported evidence (Goulding, 2005:297).

Grounded theory thereby provides a systematic research methodology that takes into consideration existing theories and ideas; but importantly is not driven thereby, allowing the researcher to effectively deal with the evidently fragmented extent and subjective nature of the South African wine tourism industry. With the multiple stakeholders, perspectives, interests, opinions and conjecture prevalent in the research field of local wine tourism, grounded theory can significantly help the researcher to avoid stating or repeating the obvious to relevant experts or interested parties, and rather provide data categories based on many indicators and show ideas based on identified patterns.

“Thus, by following the grounded theory methodology, researchers can significantly contribute by providing knowledgeable people with theory grounded in their field of work that has been enriched by conceptualization and extant literature from multiple sources” (Fernandez, 2004: 83).

In the broadest sense then, the strength of grounded theory for this wine tourism study lies in that it develops context based explanations of phenomena (Myers, 1997), explores a broad range of management issues about behaviour, relationships and communication of people (Locke, 2001), and also is suitable for discovering emerging concepts through comparison (Goulding, 2005).

But apart from fitting the research topic, its themes and context; the grounded theory methodology is also deemed to suit the researcher's personality and prior experience. And by agreeing on a form of the methodology relative to the researcher's academic maturity, the study supervisor and researcher contend that grounded theory takes the best possible advantage of the researcher's personal, professional and research assets (Fendt & Sachs, 2008). In conclusion, by dealing with what is actually going on, rather than what ought to go on (Glaser, 1978) and through its flexible and creative procedures, the grounded theory methodology was clearly identified as most appropriate and suitable for engaging in stimulating and employable research in the complex field of South African wine tourism development.

3.2.6 Combining critical realism and grounded theory

Ultimately choosing a research strategy is not an easy task. It requires an honest internal reflection on the part of the researcher and a commitment to philosophical alignment in ontological, epistemological and axiological terms (Durant-Law, 2005). For this study though, the combination of a critical realist perspective and a grounded theory methodology was considered to most suitably fulfil these criteria, and this subsection briefly examines this as a conclusion to the academic and theoretical research methodology discussion.

Downward (2003) observes that when paired with critical realist assumptions, grounded theory is a coherent methodology, while Lee (2003) further notes that the method of grounded theory provides the best set of guidelines for theory creation in critical realism because it provides for an elaboration of causal mechanisms. Moreover, a critical realist perspective allows the grounded theory methodology to respond to *“both a recognition that phenomena cannot be directly measured (and thus that some level of interpretation of meaning constructed through the interaction of the researcher and the researched is involved) and a recognition that there can be an*

underlying reality, albeit a reality about which knowledge will always be partial and thus the nature of such reality will always be subject to revision” (Weed, 2009: 509).

As such, the linking of critical realism to grounded theory in terms of establishing a research framework will promote the retention of the important macro-level research quality feature of being able to make a generic formal contribution to knowledge across substantive fields (Weed, 2009), which is of particular relevance in such an under-researched and inconsistently understood as wine tourism development in South Africa.

3.3 Applying the research framework

This section explains how the research framework was methodologically applied to the South African wine tourism research field, detailing the methodological considerations and the approach to implementing the critical realism perspective with the grounded theory methodology to realize this dissertation.

3.3.1 Strauss versus Glaser: The methodology argument of grounded theory

As introduced earlier, there is a degree of confusion and debate surrounding grounded theory and a debate on procedural and methodological issues continues. Even a brief examination of the literature reveals that there is indeed extensive plurality of grounded theory research perspectives and styles (Buckley & Waring, 2005; Locke, 2001; Onions, 2006; Tan, 2009). Moreover, there is an identified trend of “philosophising” instead of “practicing” the methodology Fernandez (2004: 83) with “a growing gap between those who actually engage in grounded theory and those who write about it” (Suddaby, 2006: 638).

With this in mind, before continuing the explanation of the grounded theory as utilized in this study, it is important to state that it is not the intention of the researcher to further the Glaserian versus Straussian procedural argument by advocating a particular stance. Rather this study would emphasize the benefits of the grounded theory methodology as it has evolved in its contemporary usage (Fischer & Otnes, 2006).

Over time, grounded theorists in all disciplines have diversified their approaches, but to the observer, Glaser and Strauss' original methodology remains a common feature (Parker & Roffey, 1997; Gurd, 2008). The flexible and un-dogmatic application of the method articulated by the original 1967 grounded theory program are affirmed in contemporary literature, underscoring and encouraging the creative and flexible use of appropriate procedures as chosen by the individual researcher. What is important in this procedural debate is that these research choices are informed and understood with regard to the different approaches and that they are furthermore described so that confusion over procedure and terminology can be avoided (Fendt & Sachs, 2008).

Today, most researchers do not apply grounded theory in its pure, or orthodox form (Locke, 2001) and this study is true of this observation. As an exploratory qualitative study, this research into South African wine tourism development is based on the original formulation of the grounded theory methodology, but more modern procedural elements have been adopted as will be identified and explained.

Admittedly upon entering this study field though, the researcher was unaware of the Glaser versus Strauss debate. And as the researcher was inexperienced in terms of conducting grounded theory research, further reading was therefore required. Upon consulting grounded theory literature and self-realizing the researcher's uninitiated level of practical grounded theory experience, the more structured and linear approach of the Straussian methodology outlined in relevant literature was initially favoured, particularly considering the researcher's prior work experience and academic pursuits within the South African wine tourism research setting. Consequently then, it is important to note for the application of grounded theory that this study was therefore initiated with prior knowledge of the research setting.

Although a "priori conceptualization" is usually deliberately avoided in a grounded theory study (Lye, 2008: 789), it is considered almost impossible for a researcher to achieve a completely clean theoretical slate (Eisenhardt, 1989). As a result, Lye (2008: 789) suggests *"that the researchers should read the published literature before entering the field to "sensitize" themselves, to get a feel for what is going on in the area of investigation, but that they should not be saturated in the literature or pre-committed to a particular theory or view of the subject under investigation"*.

The danger in entering a research field with a prior disposition is that the researcher's perception is prejudiced or influenced, whether conscious of it or not, thus hampering the development of untainted insights about the area of study (Goulding, 1999). However, no hypothesis or theoretical models were pre-formulated in this study, most notably due to the established lack of research within the localised South African context of the study field. But given Strauss and Corbin's more open stance toward the role of existing literature and knowledge; this grounded theory "version" was therefore considered more suited for this study and to the characteristics of the researcher's previous professional and academic experience (Rodon & Pastor, 2007).

However, the difficulty of applying a universal grounded theory process prescription, such as Strauss and Corbin's, was quickly discovered as further grounded theory literature was reviewed. The researcher uncovered the "bewildering complexity" of their particular approach as Partington (2000: 95) observes:

"Indeed, in published management research there is little evidence of the successful application of any precisely delineated prescribed approach... [Strauss and Corbin's] aim of providing a recipe to satisfy the needs of qualitative researchers from all social science disciplines whilst remaining true to the distinctive grounded epistemology of symbolic interactionism has resulted in a procedure that is, apparently, over complicated".

In summary then, grounded theory literature suggests that although the prescriptions for presenting grounded theory are becoming more defined, in terms of the data gathering and analysis procedures, the emphasis is clearly focused on key elements of the individual researcher, namely:

- the ability to remain flexible (Packer-Muti, 2009),
- be creative in the combination of approaches to obtain and handle data (Fernandez, 2004), and
- ultimately develop their own style and techniques to carry them through the entire research process (Corbin & Strauss, 2007).

For this study then, grounded theory was implemented with such a balanced emphasis; underscoring what is considered Glaser's "creativity and openness to

unanticipated interpretations” (Suddaby, 2006: 638), but then also drawing on the assistance of more detailed and prescriptive analysis strategies, as suggested by more recent grounded theory publications (such as Strauss and Corbin (1990)) to balance the grounded creative, technical and theoretical adequacy of the research.

Having established the merit and suitability of the grounded theory methodology used from a critical realism perspective to conduct the research for this study, it is now necessary to explain the systematic process undertaken to answer the over-arching research question of this study and formulate this final dissertation.

3.3.2 Initiating the research process: Primary research concern and question

As introduced in Chapter 1 of this dissertation, from the identification and clarification of the practical problem and research concern of this study as *the slow and disparate development in the South African wine tourism industry*; an initial conceptual framework was developed (see Figure 1.2 in Chapter 1). However, as the research process was further formalized, questions almost immediately arose regarding the relational assumptions and relational links that this initially proposed framework made. It quickly became evident that the researcher’s preliminary conception and cognition of South African wine tourism development was far too simplistic - naïve even.

But although expansive and ultimately uncertain, this initial conceptual framework accurately reflected not only the researcher’s personal lack of knowledge and initial inexperience with systems diagrams, but moreover also reflected the broad lack of scientific research and contextualized knowledge in terms of South African wine tourism development that is confirmed and emphasized in the literature review of the previous chapter.

Within the South African research setting characterised by a lack of accessible and relevant scientific research and intrinsic localised wine tourism developmental knowledge; the need for significant investigation into understanding the diverse aspects and elements of the South African wine tourism system and its development was emphatically evident. So from the research concern for this study (that essentially explains why this research field needs attention), captured as the evident frustration

and dissatisfaction in the perceived slow and disparate South African wine tourism developmental situation; and recognizing and appreciating the identified “knowledge-gap” on the part of the researcher; the primary over-arching research question driving this study (flowing from the concern and whose plausible answer will deal with the concern) became: *Why is the South African wine tourism industry not realizing its identified potential?* (see Figure 1.3 in Chapter 1)

In grounded theory terms, this is the broad question that the researcher begins with to provide focus to the study, helping to narrow the scope of what is not understood and what needs to be understood in order to address the practical problem and concern of slow and disparate development (Booth, Colomb & Williams, 2003). Supported by the lack of conducted research and the researcher’s relevant knowledge shortfall identified earlier, the research problem for this study was defined as needing to find out *what is actually going on in the South African wine tourism industry?*

3.3.3 Focusing the continuing research process: Refined emergent questions

Under the guidance of the identified primary research question, further questions subsequently emerged; questions that further encapsulated what needed to be answered or understood to solve the defined research problem. These emergent questions were refined and focused by the continuing grounded theory data generation and analysis processes of the research, and as such five refined research questions evolved to focus the study into finding rationale answers that could plausibly deal with the identified research concern for wine tourism development in South Africa.

RQ1: What is the developmental history of South African wine tourism?

The rationale behind this question being that an improved and integrated understanding of the historical development of the local wine tourism industry in the unique South African context should assist in identifying the key issues and determinants that have shaped and contributed toward the slow development and under-realised potential of South African wine tourism.

RQ2: Who is responsible for the development of the wine tourism industry in South Africa?

RQ3: What is the nature and extent of the management authority structures and operational systems in the South African wine tourism industry?

By researching the structures and systems of authority, responsibility, communications and management for wine tourism, these question's answers will outline the identifiable nature and extent of the existing system of wine tourism management authority and developmental responsibility. Thereby they provide considerable developmental insight and understanding into the systematic operation and industrial structures and relational linkages of the industry within its currently under-researched setting.

RQ4: How is wine tourism primarily employed and practically implemented as an industry in South Africa?

This question's rationale was to establish further understanding and knowledge of the current operation, function and experience of the key emergent role-players within the local wine tourism system, thereby advancing comprehension of the actual South African wine tourism experience and industry that is seeking to be developed.

RQ5: What are the problems limiting South African wine tourism development?

By identifying the spectrum of perceived limitations to wine tourism development and clarifying the emergent critical developmental issues and contentions currently facing the South African industry today; insight into, and the identification of priority matters and considerations for future actions to address and plausibly solve the research concern of slow, disparate, haphazard and uncoordinated development can be qualitatively empowered and facilitated.

3.3.4 Integrating the “Small Wins” approach

The systematic process used in this study is found in the adoption of a “Small Wins” approach to applying the grounded theory methodology. This small wins process starts with the researcher setting a strategic intent of what it is that the study ultimately aims to achieve, which in terms of this study was defined as to further the individual researcher's understanding of wine tourism as a whole with the ultimate ambition of broadening and strengthening the researcher's potential career

possibilities in this field, as captured in the research motivations in Chapter 1. The process then continues with the researcher entering the study field and commencing with a series of grounded theory based research projects.

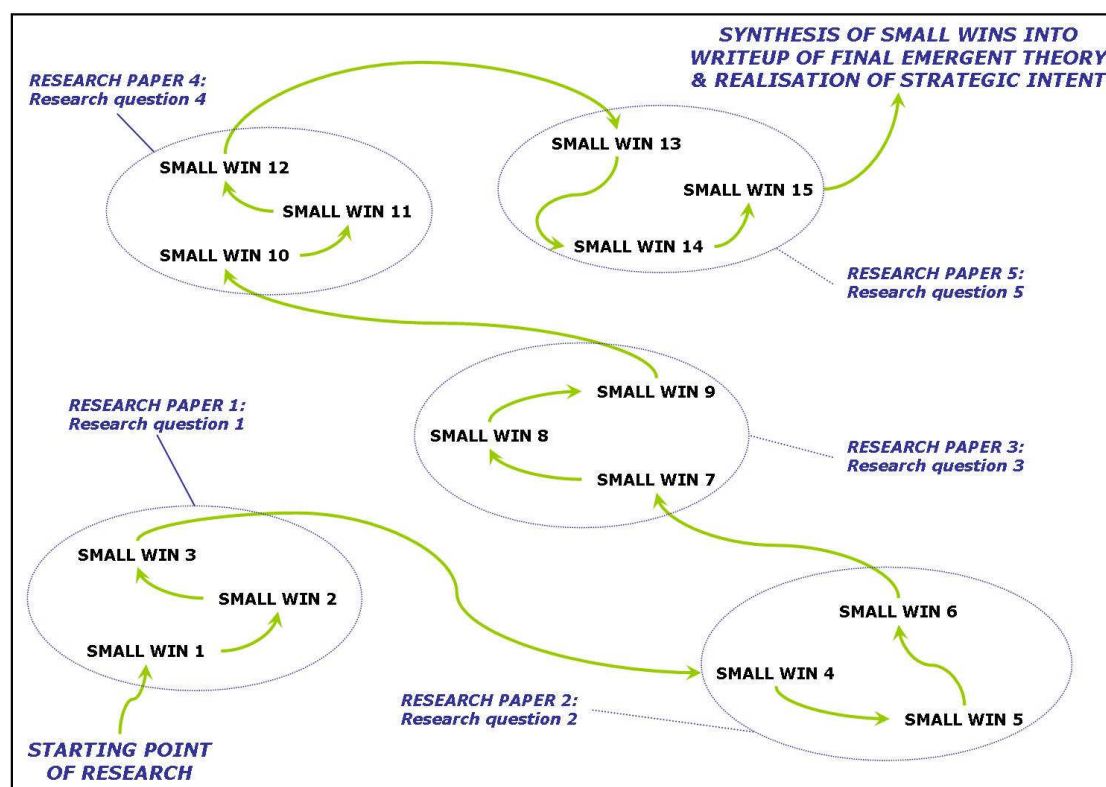
A *small win* per se is simply a concrete, complete, implemented outcome of moderate importance that moves the researcher towards the study's strategic intent and the final dissertation as part of the research process. Small wins are immediate, tangible and controllable opportunities that produce visible results for improving and moving the process forward (Weick, 1986). Although often "scattered" in nature, small wins do tend to cohere in the sense that they move in the same general direction and once a small win has been accomplished, forces are set in motion that tend to favour another small win (Ryan, 2007a; Weick, 1986).

As emphasised in the opening chapters of this dissertation, study fields like wine tourism sometimes suffer from what Weick (1986: 32) calls "too little arousal", elaborating that when people think too much or feel too powerless, issues become depersonalized. This depersonalisation, leads an industry's stakeholders to inactivity or apathetic performance, such as that which is evidently experienced in South African wine tourism development. Significantly then, the prospect of a small win has an immediacy, tangibility, and controllability that can reveal the fine-grain detail of emergent problems and identify leverage points from which these problems might be addressed within the South African wine tourism context (Weick, 1986).

By itself, one small win may seem unimportant, however a series of wins at small but significant levels provide information that facilitates learning and adaptation, and reveals a pattern of progress in the research process. Such a cluster of small wins is usually significant enough to be gathered up into a retrospective summary for a write-up or publication (Ryan, 2007b; Weick, 1986). In terms of this study, these "small wins clusters" emerged from the refinement of the five research questions as the research process continued to progress. This small wins approach manifested in five wine tourism research papers, conducted between January 2007 and January 2010, each thematically driven and focussed to pursuing the answers to one of the emergent research questions that iteratively evolved. These research papers thereby represent the grounded theory path taken to answer this study's overarching research question

and moreover to attempt to address and solve the identified practical problem and concern in South African wine tourism development. A representation of the small wins process, with the research paper write-up clusters for each emergent research question is depicted in Figure 3.4.

Figure 3.4: Diagrammatic representation of the research process integrating the small wins approach.



Source: Adapted from Ryan, 2007a, 2007b.

Each of these successive research papers once completed then offered answers or insight to one of the refined emergent research questions explained in the previous sub-section, thus representing a continuation of the grounded theory building process toward addressing the concern and practical problem of slow and disparate development in South African wine tourism.

3.3.5 The inclusion of Case Studies within the grounded theory methodology

Although the main thrust of the research framework is founded in Grounded Theory, within the dynamic and evolving nature of this methodology and the research process, the need for a specific and practical real world investigation became evidently

apparent during the course of this study for addressing one of the research questions, namely RQ4: How is wine tourism primarily employed and practically implemented as an industry in South Africa?

Case Study research was subsequently identified as the most appropriate research method for this emergent refined wine tourism research question as case studies investigate:

- a unit of human activity;
- which can only be studied or understood in context;
- which exists in the here and now;
- that merges with its context so that precise boundaries are difficult to draw (Gillham, 2005).

In their inherent pursuit of answering specific research questions, and in their seeking of a range of evidence from multiple sources held within the case setting, case studies are deemed to present the most suitable method for this specific avenue of inquiry, particularly as the research question pertains to unknown and highly specific characteristics (practical implementations of wine tourism). Moreover, and similarly to grounded theory, one does not begin with a “*priori*” theoretical notions and as such the case studies help build theory (Gillham, 2005).

Therefore, by providing supporting knowledge and deepening the understanding of the practical wine tourism phenomenon, situation, and the motivation and meaning for those involved, case studies are a valuable and necessary research technique included in this framework for refining the emerging wine tourism development theory and also suggesting complexities for further investigation, as well as helping to establish the limits of generalizability of this study and its findings (Stake, 2003; Laws & McLeod, 2004).

Summarily then, once the five research papers of this study were completed using the grounded theory methodology integrating the small wins process and the use of case studies, a second stage conceptual development process was undertaken. This is

where the emergent themes, patterns and theory of all the gathered data were metasynthesised into this final dissertation.

3.3.6 Metasynthesis: Collating all the research results and findings

A *metasynthesis* is considered essential to advancing knowledge and influence practice (Jensen & Allen, 1996) and can be defined as “the theories, grand narratives, generalizations, or interpretive translations produced from the integration or comparison of findings from qualitative studies” (Sandelowski, Docherty & Emden, 1997: 366). In terms of this study, these “qualitative studies” are represented by the five research projects, each guided by one of the identified research questions as explained above. A metasynthesis is a complex interpretative task that involves “carefully peeling away the surface layers of studies to find their hearts and souls” (Sandelowski, Docherty & Emden, 1997: 370). Xu (2008: 174) concisely summarises a metasynthesis as “...a genre of research that refers to a “study of studies” that attempts to synthesize or integrate findings of qualitative studies to seek new insight beyond the findings of each included primary study, thus conceptually achieving the effect of the total being greater than the sum of the parts.”

For this study, the final dissertation is a product of a theory-building metasynthesis, where the research extends the level of theory beyond what could be achieved in individual investigations (Polit & Beck, 2007). As such, this dissertation metasynthesis aims to create larger interpretative renderings of all of the five research papers conducted in this wine tourism development domain; but also to remain faithful to the interpretive rendering in each particular paper (Barroso, Gollop, Sandelowski, Meynell, Pearce & Collins, 2003). By bringing together and breaking down the findings of the five papers and examining them through the principals of grounded theory; the essential features of South African wine tourism development are discovered and combined into a contextualized and data driven whole (Schreiber, Crooks & Stern, 1997), as represented for this study in the synthesised emergent final theory presented in Chapter 4.

3.4 Data Generation

A grounded theory begins with the data gathering process. However, data gathering is not an isolated process; indeed, as highlighted earlier, data collection and data analysis are deliberately connected in the grounded theory methodology. Specifically, the process of data collection for generating grounded theory involves theoretical sampling, “whereby the analyst jointly collects, codes and analyses his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges” (Glaser & Strauss, 1967: 45). The collected data undergoes constant comparison and this process continues until the very end of the research, allowing the research samples to be guided and controlled by the emerging theory (Fernandez, 2004; Kirk & van Staden, 2001). This process is procedurally encapsulated within the small wins approach adopted by this study and the refined emergent nature of their guiding and driving research questions.

For this study, grounded theory has summarily been described as a research methodology that is aimed at the development of systematic theories grounded in widespread empirical data about a studied phenomenon. Therefore, the material that is collected and analysed can originate from a variety of sources (Geiger & Turley, 2003). In this study, there were three main quantitative data gathering techniques utilized, namely:

- documentation,
- observation, and
- interviews.

In the following sub-sections these various data collection techniques, their implementation issues and general investigative considerations and decisions are explained, evaluated and justified as they were applied in terms of achieving and completing this research.

3.4.1 Data generation: Documentation

For the purposes of this study, a document can broadly be defined as written text (Sanghera, 2007) and as established in the previous chapter's review of the available and relevant documentation on South African wine tourism; the scientific research into the specific South African context or such written texts are, to use a wine term, "rather thin". But documents remain important as they are generally unobtrusive, can be viewed repeatedly once obtained and also cover a wide spectrum of time, events and settings (Poole, 2000; Sanghera, 2007). In this study, a broad classification of documents appropriate to this topic was identified and engaged by the researcher as a progressive part of the undertaken grounded theory data gathering procedure (Dick, 2005).

Some primary documents, such as books and compact discs, were available from various South African academic libraries, but the majority of international wine tourism research and documentation was accessible via the World Wide Web through subscription journals and online academic publication databases. However, because South African-specific wine tourism scientific research is not nearly as extensive as it is for example, Australia or the United States, the majority of local wine tourism information was located through online wine industry trade, news and editorial websites. And considering the unstructured and relatively undocumented nature of the South African wine tourism industry, these portals were instrumental in the initial identification of industry stakeholders, contact details and wine tourism news, policies, trends and developments. Where such appropriate material was identified, it was generally immediately available in electronic form, or alternative sources and the applicable acquisition processes and costs were indicated. Of the academic publications identified, most were readily accessible, however private or corporate material was often restricted or prohibitively expensive to acquire.

It is important to note that the commercial nature of the wine tourism industry did somewhat cloud the intended scientific nature of online investigations. Although useful web links and referrals were identified through basic keyword searches, the majority of the primary and secondary documentation obtained directly via the internet was located through highly specific advanced searches. To do so, particular databases, documents, papers and authors were identified and shortlisted from tertiary

documents and commercial material located by expansive and generic searches and subsequently then explored and pursued in specific searches. The eventual research interviewees and participants also provided digital copies of, or direct online links to relevant documentation and materials, or further suggested alternative sources and contacts if specific documents of interest were of a restricted nature, incomplete or difficult to access.

3.4.2 Identifying industry stakeholders and potential study participants

Due to the unclear definition and the fragmented, yet expansive scope of wine tourism within the greater wine and tourism industries of South Africa, there is a tremendous variety of possible stakeholders. Furthermore, there are considerable differences in the levels of involvement and vested interest of these stakeholders. As such, the initial sample population was kept as broad as possible and potential study participants were expansively identified as “wine tourism industry participants”, with an identified, documented or referenced involvement or responsibility in the broader South African wine tourism industry. And as the research process continued, so too did the identification of appropriate industry figureheads and individuals.

These stakeholders were identified from the available literature and media sources, previous academic and employment experience, social and professional networks and references, and from observation in the continuing grounded theory research. Such identified stakeholders included wine farms (ranging from boutique style through to destination and resort type), wine routes, tourism operators and consultants, various wine and tourism organisations, companies, associations, councils, forums, committees, marketers, distributors, recruiters, researchers, academics, journalists, municipalities and government departments and agencies. Potential study participants were contacted from these various stakeholder groups as representatives of the broad spectrum of wine tourism industry activities and participated according to their willingness, availability and cost and time constraints.

3.4.3 Data generation: Stakeholder interview

The primary data source for this research was in the form of stakeholder interviews with a total of 95 being conducted for the dissertation. Interviews are considered an

effective way of finding out what is going on in a research field (Patton, 2002) and three formats of interviews were subsequently utilised, namely:

- face-to-face,
- telephone, and
- email.

The particular format of interview used depended on the particular requirements or limitations of the individual study respondent. These requirements and limitations were established after gaining their permission to participate, which was accomplished by an initial contact; either by phone or email, whereby the selected potential research respondents were invited to participate in the study (see Appendix 1).

Once the respondents had agreed to participate, they were sent an email introducing the study and describing its background, technical issues, confidentiality and academic requirements, and providing an overview of the avenue of inquiry with the main research questions (see Appendix 2). Although each of the interview formats required different techniques and approaches, all of them required some preparation on the part of the researcher. This preparation was achieved through the initial reflection upon guiding stakeholder questions regarding setting, people, processes and issues. These preparatory questions are summarised in Table 3.1.

Table 3.1: Preparatory guidance questions for stakeholder interviews.

| | |
|--|--|
| <p>1. Questions about the setting:</p> <p>What is this place like?</p> <p>What does it look like?</p> | <p>3. Questions about processes:</p> <p>What are people trying to accomplish?</p> <p>How do they do this?</p> |
| <p>2. Questions about people:</p> <p>Who are the people involved?</p> <p>What are they like?</p> | <p>4. Questions about issues:</p> <p>What are the key issues for these people?</p> <p>What is important to them?</p> <p>How do they describe what is important?</p> <p>What language do they use?</p> |

Source: Adapted from Ryan, 2007c.

The following sub-sections explain and examine the particular processes, techniques and considerations for each of the various interview formats used in this study.

3.4.4 Interview: Face-to-Face

In face-to-face interviews, the introductory study overview email was sent between three days and three weeks in advance of the agreed appointment, depending on the availability of the respondent. The interviews were usually conducted at the respondent's place of employment; or when their travel arrangements or schedules prohibited this, at a suitable local alternative of their recommendation. During the appointments, an exploratory semi-structured conversational interview approach was implemented, as it is recognised to be flexible enough to allow adaptation to each context, organization and individual; and also to facilitate the pursuing of unexpected paths and cues within the interview itself (Conrad & Schober, 1999; Correia & Wilson, 1997).

The conversational interview technique commenced with a framing of the interview process for the interviewee by confirming the overarching purpose of the study, the objectives of the interview and also outlining the interview technicalities such as use of response notation and recording, and the possibility of follow-up questions and response debriefing. Although several predetermined topics and questions were introduced to guide particular avenues of inquiry specific to the study, the procedure of the interview tended to follow the dynamic of a conversation, thereby encouraging open, insightful and detailed responses. Glaser and Strauss (1967) stress the importance of this to avoid the imposition of a premature diagnostic structure on the gathered research data. During the course of the entire study a total of twenty five face-to-face interviews were conducted with comprehensive mind mapping and field notation and concluded with an extensive interviewee debriefing. The reviewed and edited responses were then transcribed to digital format (on a PC) immediately after the conclusion of the interview.

The face-to-face interview experience suggests that conversational interviews are not only powerful data generation tools, but also considerably effective in strengthening current, and improving future professional and social networks. From a methodological point of view, face-to-face interviews allow for immediate feedback

and response and provide scope for secondary observances on the part of the researcher. They also have the further advantage of the place-of-work setting, whereby the interviewee was in an environment of their convenience and comfort, setting them at ease, promoting responsiveness and openness (Fluck, 2003). Furthermore, additional information such as documents, photographs, references and new contacts along with other supporting or explanatory materials were readily at hand. However, in some interviews though, the place-of-work setting was perceived to be interruptive, with the daily office requirements of colleagues and other work pressures distracting respondents, protracting interviews and occasionally necessitating a postponement of the interview.

3.4.5 Interview: Telephone

The second interview format that was used was telephonic interviews, which were conducted at the specific request of the interviewee, after they had received the study's introductory email. Like the face-to-face interviews, the telephone interviews also followed a conversational style of interview process. However, it was more structured, with more prepared and direct questions. This was necessary to keep the telephone calls a productive length, especially as the primary reason for respondents requiring a phone interview was time constraints. Although in order to facilitate a thorough interview, the possibility of follow-up phone calls was approved by the respondent prior to initiating the actual interview. Respondents were also reminded of the interview details and technicalities contained in the introductory email. The interviews were again conducted with comprehensive mind mapping and notation and the reviewed and edited responses were then transcribed to digital format (on a PC) as soon as possible after the conclusion of the interview.

Much like face-to-face interviews, telephone interviews also allowed respondents to remain in their locations of comfort and convenience and to exercise control over the time frame of the interview, highlighting the economical and feasible characteristics of telephone interviews (Corkum, Schachar, Tannock & Cunningham, 2007). Furthermore, telephone interviews allow "visual anonymity" (Tausig & Freeman, 1988: 425) that from a technical perspective reduces respondent self-consciousness which could hamper open and detailed responses. However, this lack of physical interaction does require the interviewer to effort greater verbal engagement in order to

strike a clear, functional and indeed pleasant communication with the respondent. Telephone interviews further require determined “auditory vigilance” (Tausig and Freeman, 1988: 425) on the part of the interviewer in order to ensure that responses are correctly understood and noted. However, although telephone interviews only represent a small proportion of the total responses in the research (four in total), they explicitly emphasized the importance of quickly establishing and maintaining a good rapport with study respondents and the value of thorough preparation in interview management.

3.4.6 Interview: Email

The final interview format used in this study was email interviews, which were firstly planned only as an alternative to face-to-face interviews, where distance and travel costs prevented them. However, in response to the sizable number of requests for the use of this particular format received in the initial stakeholder contact process, email interviews were then offered according to the wishes of the respondents. The actual interview procedure commenced with the study’s introductory email and was followed by the projects particular questions. These questions were as comprehensive as possible with suitable explanation. But provision was made for follow-up emails as the email based interview process did not necessarily consist of a single “email and reply” cycle for each respondent.

The emails sent to respondents followed a structured style, necessary for the text-based nature of the interview format, but questions were open without fixed responses thereby encouraging more dynamic, considered and insightful input from the respondent. All email responses were exported directly from the secure private digital mail server to a MS Word document as soon as they were received for ease of access and to effort data security.

Although face to face interviews are considered as the gold standard of qualitative research, email based data gathering is indeed recognized as a powerful research tool, particularly as such email research can overcome many of the barriers to more conventional research approaches (Flicker, Haans & Skinner, 2004). The benefits of email based interviews were affirmed in this study in that they represent the overwhelming majority of study responses (66 in total).

A number of benefits to email interviews were also emphasized by respondents in their motivations for requesting them, with “convenience” being the most prevalent. Specifically in that respondents could participate and complete interviews in their own time and environments, which furthers the opportunity for reflection and consideration, and encourages a greater depth of response from the participant. Other advantages of email interviewing include the visual anonymity similar to that described in the previous telephone interview section and furthermore that the email interview responses are already written in immediately usable text format, negating the need for transcription (McCoyd & Kerson, 2006).

However, emails do present a number of challenges to data gathering. Tempering the benefit of respondent convenience is the critical responsibility of the researcher to establish a digital rapport with the respondents to encourage timely and comprehensive responses. Emails are often, albeit unintentionally “toneless” and they are easily ignored or forgotten. These unfortunate character traits of emails were demonstrated in this study by a few contacted potential participants, who although initially agreeing to participate in the study, ended up either not completing the interview or did not respond at all to any subsequent correspondence. However, the completed email interviews were indeed rich in data and also afforded a continued opportunity for further professional networking. The sheer volume of requests for email format interviews and correspondence also furthermore underscores the widespread importance and ready use of this communication medium in the local wine tourism industry.

3.4.7 Data generation: Observation

The final data gathering technique used in this study was observation. As a data gathering technique, participant observation has been considered for a long time to be “central to all the social sciences” (Vidich, 1955: 354). It requires the researcher to carefully and attentively record their perceptions and observations of participants and their own participation in the particular phenomenon or setting under investigation (Laurier, 2002; Paterson, Botterff & Hewat, 2003).

In this study, participant observation was vital to the early establishment of the conduct and the extent of commonly held knowledge of wine tourism stakeholders

(especially in the light of limited documentation in the South African context). Observation was furthermore instrumental in identifying the initial research claim that the South African wine tourism stakeholders are dissatisfied of with the general developmental state of the industry. All observances of stakeholders and perspectives of participation were recorded in a field journal and then transcribed to MS Word document format afterwards for ease of access and for data security.

3.5 Data Analysis and Theory Formulation

Although the previous section describes how the grounded theory process commences with data gathering, it is important to reemphasize that everything in the grounded theory methodology is integrated. As exemplified by its undisputed canons, particularly *constant comparison* and *theoretical sampling*, grounded theory research works through over-lapping phases (Dick, 2005) as illustrated earlier in Figure 3.3. This systematic set of phases form the data-grounded methodology that identifies the major constructs, or *categories* (in grounded theory terms), their relationships, and the context and processes of the field or phenomenon under investigation (Şen, 2006) – in this case the development of South African wine tourism. The following sub-sections examine these grounded theory phases as they were conducted for this study.

However, before beginning the explanation of the actual data analysis process, it must be remembered that in this study comprises of a metasynthesis of five “small wins” based research papers each pursuing one of the iteratively evolved research questions to realise this final dissertation. As such, the conceptual development process described below occurs in a two stage methodology. It is first undertaken at a primary small wins investigation level for each of the research papers, and it is then adopted for the metasynthesis of those paper’s key concepts and findings into the final grounded theory of this study as presented in the next chapter. The fundamental procedures and methodological application of grounded theory methodology within the small wins approach as applied in the metasynthesis of the five research paper’s results is sequentially described in the following sub-sections.

3.5.1 Grounded theory procedure: Concept formation

The process of data analysis in the grounded theory methodology of this study commences with the *coding* of the completed interview transcripts, field notation, acquired documentation and recorded observances. Coding represents the operations by which gathered data is broken down, conceptualized, and put back together in new ways and in this way form the central process by which theories are built from data (Pandit, 1996). The initial samples of for the initial “small wins” research papers were defined by the research setting and as established previously, there are a multitude of diverse stakeholders in evident in South African wine tourism development. As such the first samples for the research papers were as broad and diverse as possible (Dick, 2005). Codes were developed from these broad data samples on the basis of the research questions that guided the particular investigation and related in a conceptually consistent manner (Poole, 2000).

The first step in the constant comparative analysis of these data samples is represented in *open coding*, where the essential meaning of each sentence, phrase or paragraph is determined with no preconceived codes or categories on the part of the researcher (Glaser, 1992). Open codes are generated through the labelling of phenomena and incidents as indicated by the gathered data. The product of this labelling is *concepts*, which are the basic building blocks in grounded theory construction (Pandit, 1996). In this study, this open coding process generated numerous concepts. And although this significant amount of concepts could be attributed to what Rodon & Pastor (2007: 74) call the researcher’s self-admitted “lack of extensive and in-depth experience with grounded theory”; it was indeed these early codes and concepts that led the researcher into the different directions of investigation, thereby laying the initial blueprint for the subsequent research papers and continuing research process.

From the open coding process it was necessary to reduce the large volume of codes into groups of similar concepts within further developed *categories*. This process of grouping concepts at a higher, more abstract, level is termed *categorizing* (Pandit, 1996), and is a recurring process of constant comparison as the codes and data sets are analyzed for similarities and are then clustered together in developed categories that are given the same conceptual name based on their common properties (Streubert & Carpenter, 1999). Table 3.2 (overleaf) shows an example from one of the research

papers of this study of several open codes with a common concept, or cluster, which were categorized under the conceptual name *Communications and Coordination*.

As the process of data collection, coding and categorization continued, new directions and insights (both deemed as “small wins” in themselves) were identified from the data, helping to raise and formulate new questions for subsequent and follow-up interviews, as well as further focus the extent of the driving research questions of each of the ongoing research papers, in addition to guiding the researcher toward new possible study respondents and data sources.

Table 3.2: An example of code categorization in this research, 2009.

| OPEN CODES | INITIAL CATEGORY |
|--|--|
| Public Relations duties | Communications and Coordination |
| Information channel for industry and members | |
| General regional information | |
| Route sponsor liaison | |
| Wine route and colleague contact | |

After coding and categorizing the collected data into concepts and categories, the next step in the grounded theory process is to develop these categories and sub-categories through a process of scaling up abstraction thereof onto a higher theoretical level called *Axial coding* (Goulding, 1999). It represents the focused naming and comparing activities the researcher undertakes to fully develop the categories, specifically their properties and sub-categories and also the possible linkages between them. It involves posing a series of generative questions toward the data categories such as, who, what, when, where, when, why, how and with what consequences (Locke, 2001)?

Such axial coding is a significant characteristic of the “Straussian” grounded theory approach discussed earlier, and was purposefully incorporated in this study’s data analysis due to the admittedly haphazard nature of the researcher’s first attempts at coding at a higher level of abstraction, with particular difficulty being initially experienced in articulating relationships and patterns in the codes. However, the

ongoing data analysis was successfully forwarded with the more procedural and analytical questions of axial coding, together with the consideration and incorporation of the researcher's own theoretical memos.

These *theoretical memos* represent the researcher's noted record of analysis, thoughts, interpretation, questions and directions for further data collection (Rodon & Pastor, 2007). They emphasize the reciprocal relationship of data gathering, analysis and theory within the grounded theory methodology, and are simultaneously undertaken not only in axial coding, but throughout the data gathering and analysis process. Such memos are the write-up of theoretical ideas about codes and their relationships as they strike the data analyst while coding and analyzing (Glaser, 1978) and in this study, these memos were continually produced during the data collection and analysis process and recorded in a field journal and notebook as they occurred to the researcher as further data and theory ideas and connections. These notes and memos were especially useful in adding and revealing relationships and properties between the codes and categories and also in ultimately identifying the central theme and core variable of this study, all of which underscore the importance of theoretical memos to the final development of the grounded theory in this research.

So as a result of focusing the research analysis through axial coding with theoretical memos, and the continued expressed pursuit of discovering what the gathered data and study respondents were actually "telling" the researcher, a number of conceptual connections and relationships within the developed categories and their properties were identified. It was at this particular point that the first two small wins projects were consolidated into written reports documenting the cluster of research progress made thus far. This certainly did not represent the completion of the grounded theory process, but from the gathered data and analysis it became clear to the researcher that the driving research questions to this point were too generic and expansive and that the research problem was evidently a lot more complex in nature. In critical realism terms, from the researcher's developing empirical perspective of the actual domain of wine tourism development (events and experiences), the underlying structures and processes of reality (real domain) were discovered to be more complex and intricate than initially postulated.

However, this exemplifies the evolving and continuing nature of the grounded theory process, as categories emerged from data gathered thus far in the initial “small wins” research papers, the researcher could now usefully add to the sample range through directions indicated in the data and from study respondents themselves. As a result, the subsequent continuing data collection and sampling was driven and informed by this new emergent perspective of the research problem i.e. what actually needs to be researched and understood to answer the research question and resolve the research concern). Therefore, realizing that a comprehensive picture of the refined research setting needed to be developed, the researcher heeded the insights of the continuing data analysis process and employed more focused research questions in the following interviews.

From these analytical insights, combined with the integration of memos in the axial coding process, a central theme or overall pattern was now emerging from the developing data categories. This emergent theme essentially described “what is going on” in the gathered data, bringing a clarity of direction and vision to the researcher who admittedly at this point was struggling with the “open generative nature of early analysis” in grounded theory, possibly due to a academic history “steeped in the rigors of quantitative approaches” (Corbin & Strauss, 2007: 53). However, this emergent theme marked not only a renewed trust in the grounded theory process, but also the beginning of higher abstracted conceptual development and the path toward the actual theory formulation of the study.

3.5.2 Grounded theory procedure: Concept development

Before further explaining the continuing grounded theory development process, it is necessary to reaffirm and comprehend the integral role of existing literature in grounded theory. Literature plays a different role in comparison to other research methodologies, as in grounded theory studies such as this one, it is conceived of as “data” and is intended to assist in the ongoing discovery process and enrich the emergent theory (Kirk & Van Staden, 2001). As such, for this study the available existing literature was accessed, analysed and compared as a source of further data for the continuing collection and analysis process of each of the “small wins” research papers as it became relevant. As new concepts were developed and identified in the research, they warranted a review of compatible literature in order to help the

researcher become familiar with them, defining their relationship and ‘fit’ within the study context (Goulding, 1999). This selective review of existent literature thereby added to the theoretical description that was developing from the various coding and categorization processes and helped to fill in the missing pieces in the emerging central theory for South African wine tourism development from the continuing data gathering of each of the five successive research papers (Struebert & Carpenter, 1999).

At this point in the grounded theory process then, through the various phases of coding, categorization and the selective sampling of relevant literature, the key concepts and findings of the initial research papers had become apparent. The researcher was thereby able to orientate the continuing data analysis process on these main categories and concepts, thereby focusing the whole study on one of the basic social processes evidently identified in the collected data. This not only offered a guide to further data and literature sampling for the researcher to pursue, but also introduced the next level of data abstraction called *selective coding*. This is also a stage of coding and represents the process whereby the study is delimited to one core category and the identified significant variables that affect it (Fernandez, 2004).

To accomplish such data delimitation for this study, the number of categories involved in the continuing data analysis had to be reduced. This required the researcher to return to those research papers that had indeed been completed and compare and cluster together the identified key data categories to fit under broader categories of broader scope, based on the categorical connections and relationships identified through the analysis process. By delimiting the study to these key central categories of the research papers, a pivotal point in the development of the grounded theory for this study was reached, as it focused the greater investigation onto understanding the various interactions of behaviours and social structures of a particular process in the gathered data (Glaser, 1978).

Through systematically relating the research paper’s key central categories; and validating their relationships by further developing and filling in the categories that needed further refinement and development through continued literature and data sampling; the initial “theoretical” framework for this study was formed (Esteves,

Ramos and Carvalho, 2003). As a result, the data sampling that continued for the subsequent research paper investigations were conducted in a specific, thematically focussed or *selective* manner. Through this “selective” sampling of data, the researcher sought to refine and saturate specifically identified central categories of the already completed research papers, verifying their central properties and relationships and under which conditions they occur. Thereby ultimately adding to the completeness of the emerging central theory of all the gathered data thus far, and moreover leading to the identification of the study’s *core variable* (Struebert & Carpenter, 1999).

3.5.3 Grounded theory procedure: Identifying the core variable

This “core variable” concept refers to a data category which accounts for most of the variation in an identified pattern of behaviour and which helps to integrate other categories that have also been discovered (Struebert & Carpenter, 1999). As such, the core variable effectively pulls all the research strands together, to offer an explanation of, or theory accounting for, the behaviour under investigation (Goulding, 1999). For this study, the core variable emerged from the continued constant comparison of the key central categories and concepts of the completed successive research papers, revealing itself through a consistently high frequency of mention in the interviews and literature and a readily identifiable interconnection to many of the other emergent data categories established during the course of the study. This traceable prevalence and development throughout the data gathering processes of the ongoing research papers investigations confirmed the identified core variable’s theoretical significance to the researcher and moreover, justified itself as the basis of the emergent grounded theory for South African wine tourism development. As such, the subsequent sampling and analysis efforts of further research paper investigations were now delimited to the coding, sampling and memo-ing of this core variable, the other categories and variables connected to it, and the properties of both until the point of saturation was reached (Dick, 2005).

This saturation occurred when the continued analysis of collected data revealed a perceived “diminishing returns” (Dick, 2005), where further interviews, literature searches and observances of the researcher did not add anything to what had already been discovered regarding the core variable, its properties and related categories and

variables. As such, further sampling would have failed to add significant value to the study and moreover, it was at this point that the researcher could account for the main question and concern of the research (Dick, 2005; Pandit, 1996). Data collection and sampling for this study was therefore subsequently concluded.

3.5.4 Summary of the development of the emergent grounded theory

So from the totality of identified relationships, behaviours, categories and processes involved with the identified core variable, a narrative was integrated and synthesized from the five now completed research papers to explain the properties, dimensions and circumstances under which they are connected (Calloway & Knapp, No Date). A final comparison of theoretical memos and selective sampling helped modify, integrate and validate this narrative, to finally metasynthesis all the research papers results and findings into the completed data-grounded theory for this entire study as described in the following chapter.

In critical realism terms, the researcher was now empowered with a theoretical understanding of the “real world” of South African wine tourism development and the final grounded theory of this study thereby offering an explanation of the *processes, structures, powers and causal mechanisms* that generate the actual *events and experiences* of the research setting as captured in the research concern and questions.

By way of a final summary of the research framework and process, the progression of Figure 3.5 offers a general overview of the research process as followed in this study. Figure 3.5.1 (overleaf) illustrates the initial basic outline of the framework, indicating how the research concern and practical problem motivates the overarching research question and defines the research question of this study.

Also depicted is the conceptual integration of the grounded theory methodology and critical realism paradigm with its empirical domain is made up of experiences and events identified through observations, the actual domain which includes events and experiences whether observed or not and the real domain consists of the processes, structures, powers and causal mechanisms that generate the events and experiences within wine tourism.

Figure 3.5.1: Initial theoretical and conceptual elements of the research process, 2010.

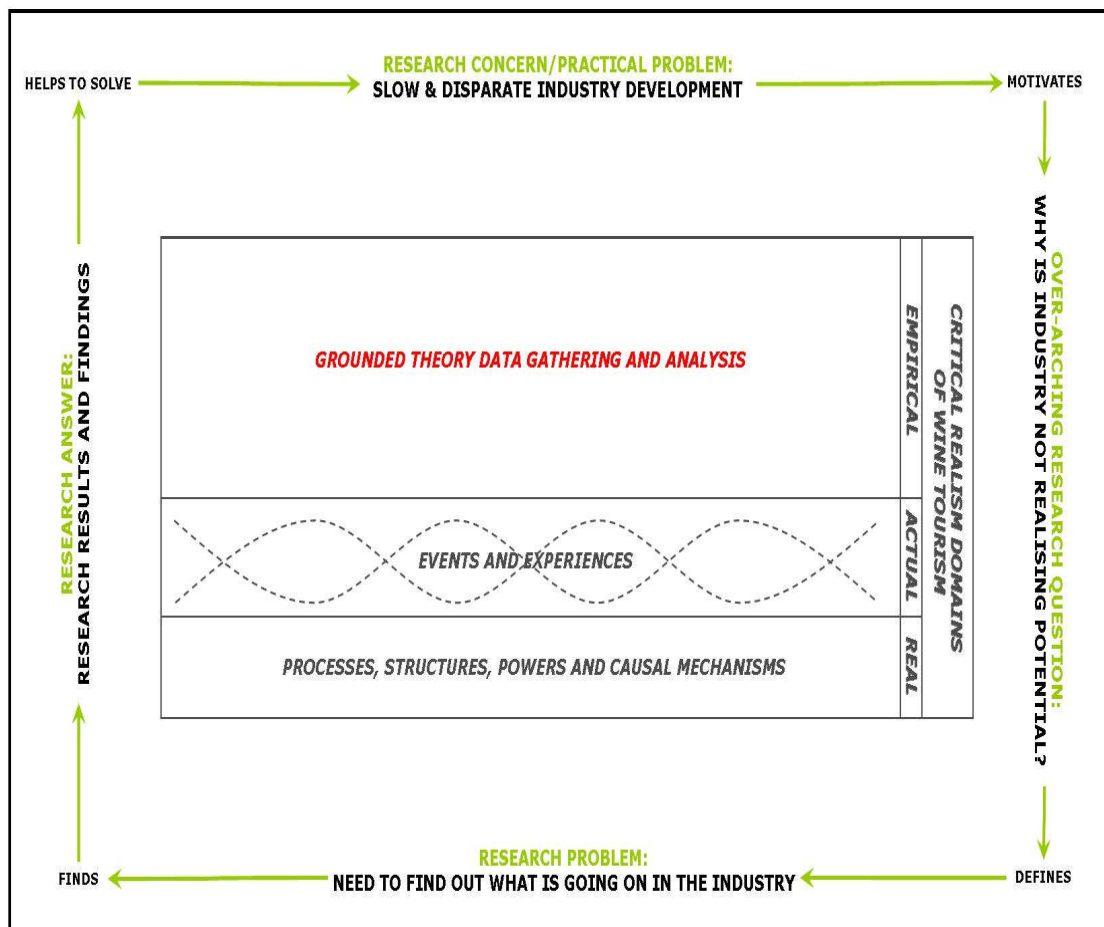


Figure 3.5.2 (overleaf) graphically elaborates on the research process by illustrating the integration of the continuing small wins approach (indicated with blue arrows) to applying the grounded theory methodology within the evolution of the emergent refined research questions, their relevant data generation and analysis (as indicated with red arrows) and the associated research papers.

Figure 3.5.2: Detailing the integration of research approaches and methodological data gathering and analysis into the research process, 2010.

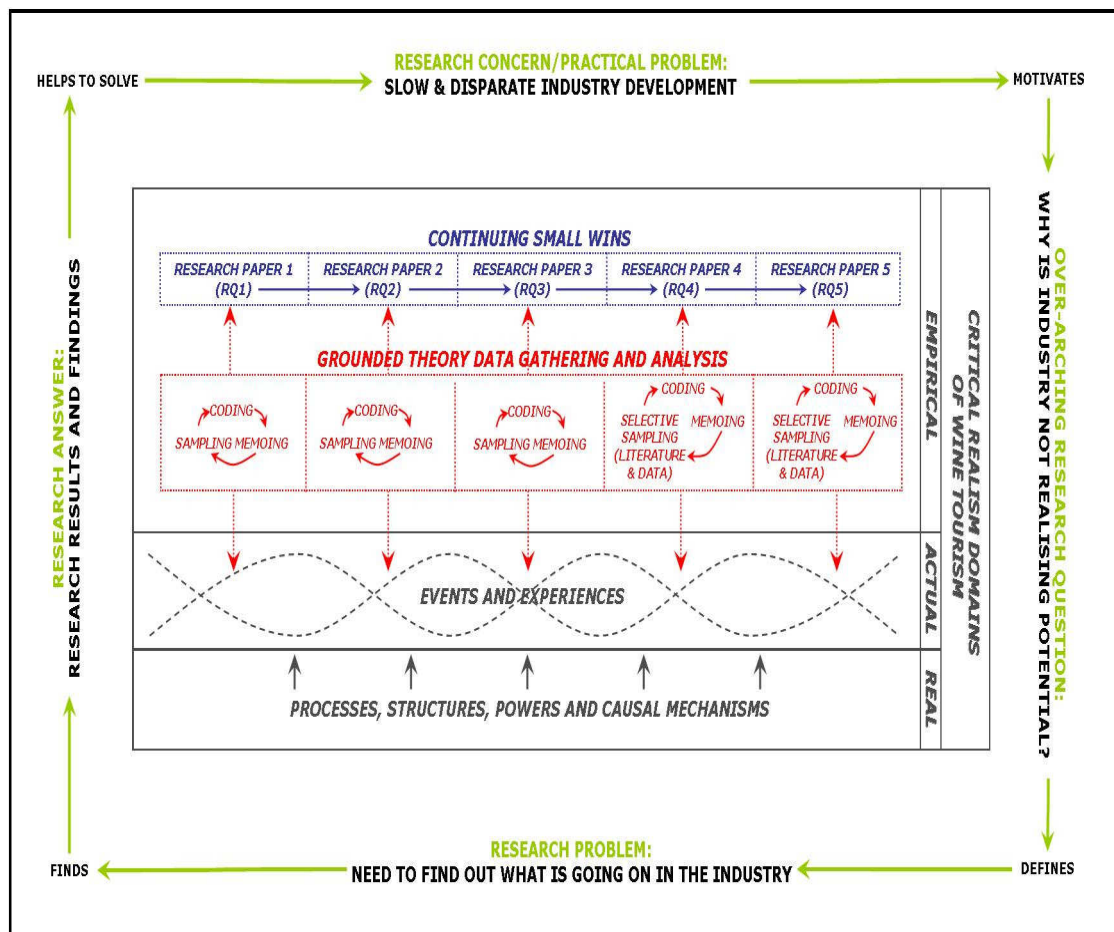
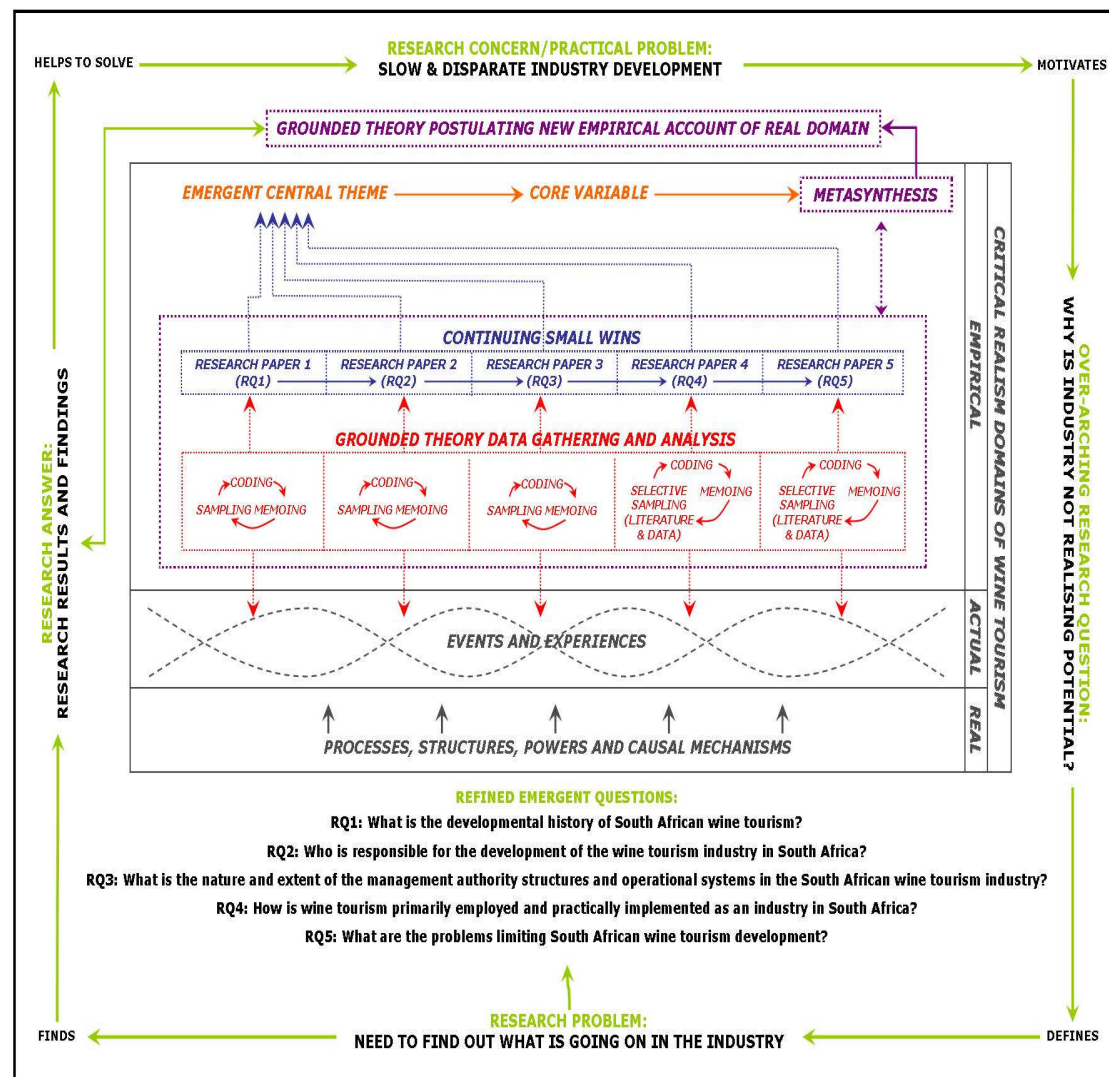


Figure 3.5.3 (overleaf) represents a complete graphical summary of the research process by indicating the emergence of a central theme from the completed research papers, the subsequent identification of the core variable and finally integrating the metasynthesis of the emergent data findings to realize the final grounded theory for this research that thereby ultimately postulates an answer to the overarching research question of why the South African wine tourism industry is not yet reaching its perceived potential, and therein provides plausible directives and insight to addressing and dealing with the research concern and practical problem of slow and disparate industrial development.

Figure 3.5.3: General overview and summary of the research process, 2010.



3.6 Conclusion

This chapter has comprehensively described, justified and evaluated the research framework and process undertaken in this study. The critical realist paradigm was firstly introduced and explained as the perspective or ontology of this research; where this theory of the South African wine tourism development “world” comprises of the empirical, actual and real domains of the greater research setting (Ryan, 2009b). The grounded theory methodology was also introduced, explained and motivated as to how it facilitated the researcher to engage with the “actual world” of South African wine tourism through the observations, documentations and interviews conducted in

the small wins projects, thereby developing an emergent metasynthesised data-grounded theory that postulates the structures and mechanisms that cause and explain the relationships, events and ideas in South African wine tourism development today. To this end, a procedural account of the data generation and analysis process in this study was also described and evaluated, including the underlying reasoning for the choices made and rationale for the approach undertaken thereto.

In conclusion, the research framework to develop a view of South African wine tourism development used by the researcher, which incorporates critical realism, grounded theory, small wins and metasynthesis was deemed to suitably fit the creative and flexible demands of the exploratory research defined by the initial overarching research concern and question. The following chapter describes the metasynthesised results and findings from this completed research process and explains the final emergent grounded theory of this study.

"Go, eat your food with gladness, and drink your wine with a joyful heart, for it is now that God favours what you do."

Ecclesiastes 9:7 (Ecask, 2007).

CHAPTER 4

TASTING THE WINE: RESEARCH RESULTS AND FINDINGS

4.1 Introduction

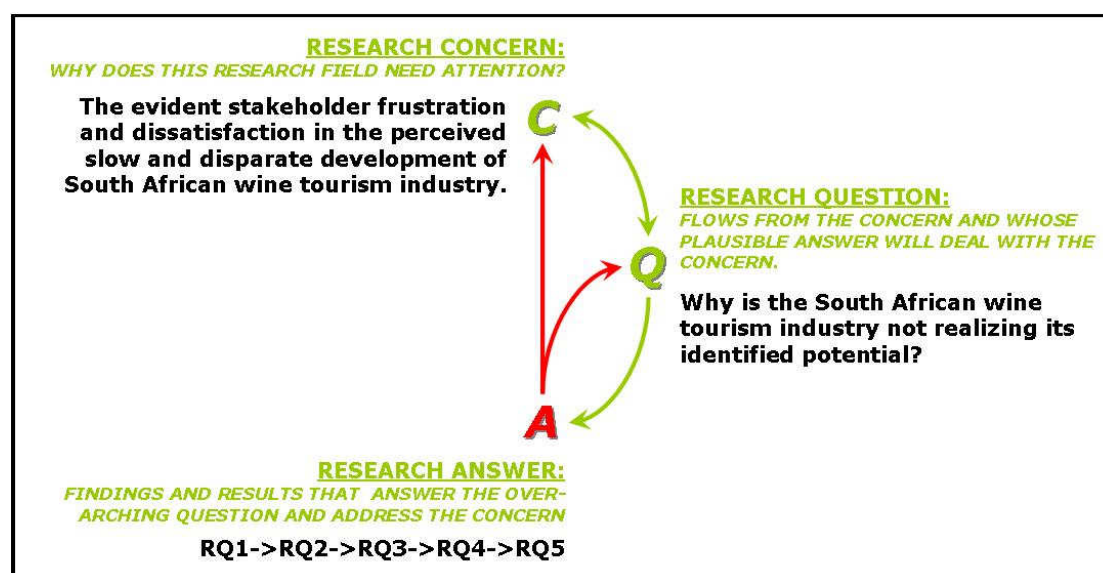
This chapter presents the results and key findings of this study's research as conducted over the period from January 2007 to January 2010. As explained in the previous chapter, from the identified practical problem and primary research concern; the slow and disparate development evident in the South African wine tourism industry; the study's holistic research direction and data gathering process was focussed by the overarching research question of *why is the South African wine tourism industry not realizing its broadly perceived potential?* The results presented in this chapter represent the application of the research framework and thereby collectively synthesise an emergent answer to this overarching question, and so doing also provide plausible data grounded solutions to addressing and dealing with the research concern of South African wine tourism's currently slow, disparate and frustrating development.

As outlined in Chapter 3, in order to solve the practical problem captured in this overarching research question, the corresponding research problem of needing to find out *what is going on in the South African wine tourism industry* was identified. The scope of this research problem was emergently established in five further refined research questions that evolved to focus five successive research papers that applied the grounded theory methodology. These refined research questions are summarised as:

- RQ1: What is the developmental history of South African wine tourism?
- RQ2: Who is responsible for the development of the wine tourism industry in South Africa?
- RQ3: What is the nature and extent of the management authority structures and operational systems in the South African wine tourism industry?
- RQ4: How is wine tourism primarily employed and practically implemented as an industry in South Africa?
- RQ5: What are the problems limiting South African wine tourism development?

The following sections in this chapter describe the research results and findings of these questions as part of the central thesis of proposing answers to the research question and thereby address the primary research concern as illustrated in Figure 4.1.

Figure 4.1: The position and role of the research answer in the central thesis of the study.



Structured to reflect the emergent grounded theory development process that was followed as the research questions and sampling direction evolved; the various subsections below describe and argue the various perceived powers, processes, structures and causal relationships with their underlying propositions regarding the identified research data categories and variables. As such, the results and findings from the documentation, interviews and observation are integrated into a metasynthesised narrative that allows each section in this chapter to describe a key milestone in the emergence of the final data-grounded theory for South African wine tourism development. This chapter is summarily concluded with a description and explanation of this developed grounded theory.

As a means of providing a thesis navigation device, this chapter also includes modified versions of Figure 3.4 (see Chapter 3) which outlines the ongoing small wins process. The figures are included with highlighted areas to help the reader

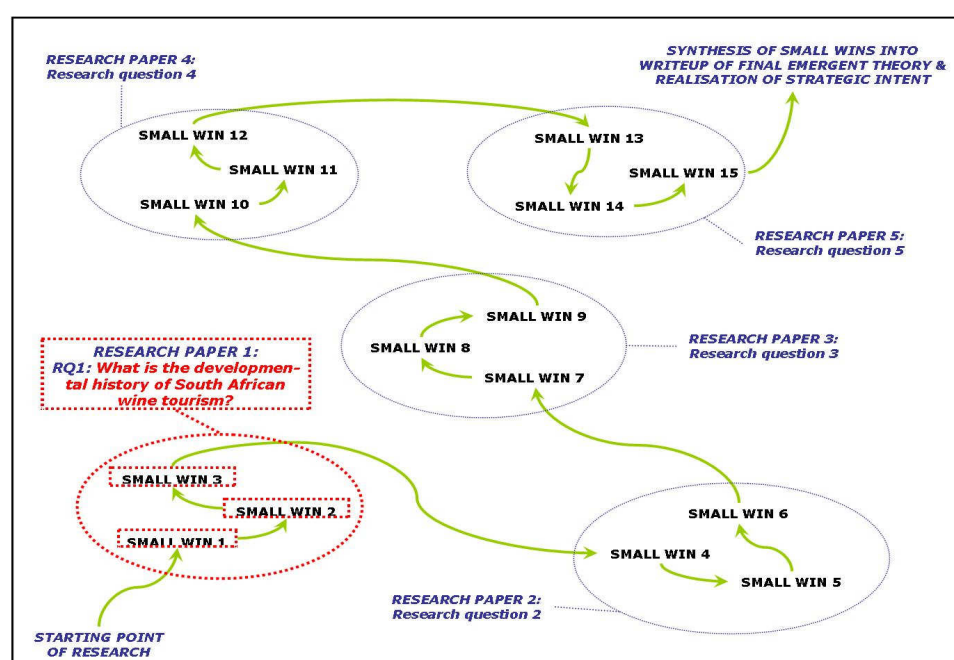
orientate the relevant research results and findings within the process of the research framework.

4.2 Historical development of South African wine tourism (RQ1)

This section introduces and examines the historical development of the South African wine tourism industry. These research findings represent the first investigative step taken in the grounded theory process of applying the research framework toward uncovering data and information (research results) that will help to ultimately resolve the research concern. With the rationale being that an improved and integrated understanding of the historical development of the local wine tourism industry in the unique South African context would assist in identifying the key issues and determinants that have shaped and contributed toward the slow and under-realised potential, the first research question initially emerged as *how the South African wine tourism industry historically developed and established itself?*

This section summarily represents the results and findings of the first research paper conducted in this study. See the area outlined in red in Figure 4.2 below.

Figure 4.2: Orientation of RQ1 results and findings within research framework and narrative process.



4.2.1 Contextualising South African wine tourism

Upon engaging upon this avenue of research, the characteristic role of literature as data within the grounded theory methodology became clearly apparent. As emphasized in the literature review of Chapter 2, a dual industrial heritage of the wine and tourism sectors were identified as significantly characterized by:

- past remnants of industrial and government protection,
- policy conflict and confusion,
- international tourist isolation,
- high reliance on private capital output and investment,
- considerable personal, political and legal conflicts,
- post apartheid capacity limitations,
- industry experience shortfalls,
- culture of wine producer self-preservation, and
- a prevailing sense of internal competition punctuated with non-collaborative practices.

However, although the literature and information regarding these formative conditions, events and processes that were prevalent during wine tourism's historical development in South Africa, does empower and enhance an initial perspective of the contextualised research setting; as part of applying the research framework, the emergent implications hereof have yet to be considered and evaluated in terms of their significance for the research concern of slow and disparate wine tourism development.

In following the grounded theory methodology and allowing key themes to emerge from the data, the international importance of "wine routes" was significantly identified in the wine tourism literature. But more pertinently to the South African wine tourism research context, wine routes were also unanimously recognised as the first manifestation of "organized wine tourism" in South Africa. Furthermore, they were also widely coincided with, and ultimately considered to historically reflect, the development of the local wine tourism industry as a whole.

As such, the introductory and establishing RQ1 was further refined to take cognizance of the revealed historical wine and tourism sectoral development setting within the literature (exemplifying the ongoing emergent and evolving grounded theory process). And so the research paper was focussed to investigate the broader influences, motivations and impacts of South African wine tourism's historically recognised and evidently industry-shaping wine routes - herein intending to facilitate an understanding of the driving forces and steering trends that originated wine tourism in South Africa and continue to impel the current developmental situation.

4.2.2 Wine route development in South Africa

From the available literature, it emerged that following the evidently perceived success of the initial Stellenbosch Wine Route established in 1971, the wine route model was subsequently widely and rapidly adopted as the primary tool for marketing wines and establishing a regional identity as part of progressive and entrepreneurial individual South African wine farmers and producer's wine of origin branding efforts. To further clarify and comprehend the historical relevance of wine routes as epitomizing South African wine tourism and their emergent developmental impact, fifteen of the identified South African wine routes were contacted and the management questioned to this end.

Table 4.1 (overleaf) summarises key developmental indicators and motivations as revealed in this investigation. Ordered according to the chronological emergence of South African wine routes, the table illustrates their membership growth, originating founder and significantly, the primary founding motivation.

The dominance of regional wine marketing and branding as motivation for wine route establishment is clearly evident in Table 4.1. However, what is also significant and also very indicative of the dominance of the wine sector in wine tourism developmental terms is that none of the wine routes were established by "tourism" agencies or companies. This further specifically underscores the farmers and co-operative wine cellars as primary pioneering drivers of initial wine route development.

Table 4.1: The historical establishment of South African wine routes, 2009.

| WINE ROUTE | AGE | INITIAL MEMBERS | CURRENT MEMBERS | FOUNDER | REASON |
|-----------------------|------------|------------------------|------------------------|-----------------------|-------------------------|
| STELLENBOSCH | 1971 | 10 | 147 | Farmers | Visitors & Wine Sales |
| OLIFANTS RIVER | 1975 | 5 | 15 | Co-ops | Regional Wine Marketing |
| PAARL | 1978 | 15 | 40 | Farmers | Visitors & Wine Sales |
| ROBERTSON | 1983 | 6 | 46 | Farmers | Regional Wine Identity |
| FRANSCHOEK | 1984 | 10 | 44 | Farmer | Regional Wine Marketing |
| KLEIN KAROO | 1985 | 12 | 17 | Farmers | Regional Wine Marketing |
| SWARTLAND | 1986 | 4 | 18 | Farmers & Co-ops | Regional Wine Identity |
| CONSTANTIA | 1988 | 3 | 8 | Farmers | Regional Wine Marketing |
| WELLINGTON | 1992 | 6 | 26 | Farmers | Regional Wine Identity |
| TULBAGH | 2000 | 6 | 13 | Farmer | Regional Wine Marketing |
| BREEDEKLOOF | 2002 | 22 | 24 | Farmers & Individuals | Regional Wine Identity |
| ORANGE RIVER | 2002 | 6 | 3 | Farmers | Regional Wine Marketing |
| DARLING | 2004 | 4 | 5 | Farmers & Individual | Regional Wine Identity |
| DURBANVILLE | 2004 | 16 | 17 | Farmers | Regional Wine Marketing |
| WORCESTER | 2003 | 10 | 10 | Farmers | Regional Wine Marketing |

Contextually equipped by the comprehensive literature review, the historical research findings of wine tourism in South Africa are revealed to be paradoxically characterised by conflict and initiative, such as the legal restrictions and arguments juxtaposed with the entrepreneurial pursuit evident in the establishing of wine routes. But in conjunction with the combined insight of the available literature and larger body of existent knowledge, this section and specifically the gathered data that is collated in Table 4.1, introduce, confirm and describe the emergent key figures and patterns in the localised historical development and management context that has defined and still shapes the South African wine tourism industry today.

4.2.3 Key findings and conclusions in the developmental history of South African wine tourism (RQ1)

In investigating the historical development of South African wine tourism, this section has highlighted the intrinsic link between wine tourism development and wine route development. But as emphasized in Chapter 2, wine routes clearly did not enjoy a painless birth in South Africa; one which is characterised by the evident economic, social and political controls and changes that serve as a developmental backdrop to the greater industry of wine tourism in South Africa. Indeed, rather than enjoying state support and funding to develop wine tourism such as do other New World wine countries, wine producers in South Africa literally had to fight (in legal terms) to establish the first manifestation of wine tourism, the Stellenbosch Wine Route.

But within the history of wine routes, the importance of the individual wine farm and producer is also evidently introduced. As uncovered in this research, wine producers and farmers have pioneered the establishment of every wine route in South Africa since 1971, whether as an individual, a group or a co-operative (see Table 4.1). The inherent importance of these individual producers and farmers in these historical accomplishments is further emphasized in that South African wine tourism has evidently continued to grow in the absence of the centralised cohesive support systems of other international wine countries. Most notably revealed in the conducted interviews and gathered data as a result of the investment of time, money and will of these individuals and the routes they represent. But beneath the continuing growth of wine tourism through the inspiration and establishment of further wine routes, there remains a prevalently underlying theme of conflict.

From the conducted research, most South African wine routes are revealed to have developed as a method of establishing a “regional wine identity” or as part of a “regional marketing campaign”. However, it was clearly revealed by the respondents and confirmed in the literature that this further encouraged and the proliferation of an entrenched sense of regional competition in the greater South African wine tourism industry. And although this evidently “competitive” nature of wine tourism might not immediately be considered detrimental in terms of development, but when combined with the identified historical lack of active tourism sector involvement and furthermore with the conspicuously heavy reliance of the industry development on the

investment of individual wine farmers and producers - this emergently compounded historical condition collectively led to widespread practices of non-collaboration amongst wine tourism stakeholders and indeed, within the local industry as a whole.

In the research, this competitive character of wine tourism development is currently most emphatically exemplified and embodied in the prevailing protective actions of wine producers regarding their considerable wine tourism investments and perhaps more expressly, in the identified promotion and application of an exclusive (non-inclusive) paradigm to conducting wine route and tourism business.

Throughout the historically focused research however, underlying these non-collaborative practices has been the clear dominance of the wine sector. Indeed, beneath the successful establishment of wine routes and the documented growth thereof, the research reveals that there is a historical lack of sector integration between the wine and tourism industries. As depicted in Table 4.1, local wine tourism has evidently developed primarily from the production-orientated forces and motivations of wine producers and farmers. And when further contextualised with cognizance of the closed and protected wine market and limited collaborative tourism development of the apartheid era, it is therefore apparent that the South African wine tourism industry did not develop with formal or recognized “tourism” principles, but rather with a wine-based production orientation. Indeed, as is suggested not only by the literature, by also confirmed in the conducted interviews, wine tourism in South Africa is historically revealed to be more “wine” than “tourism” in terms of sectoral contribution to development; with the wine sector dominating the evident development and management initiatives, in motivation and in responsibility.

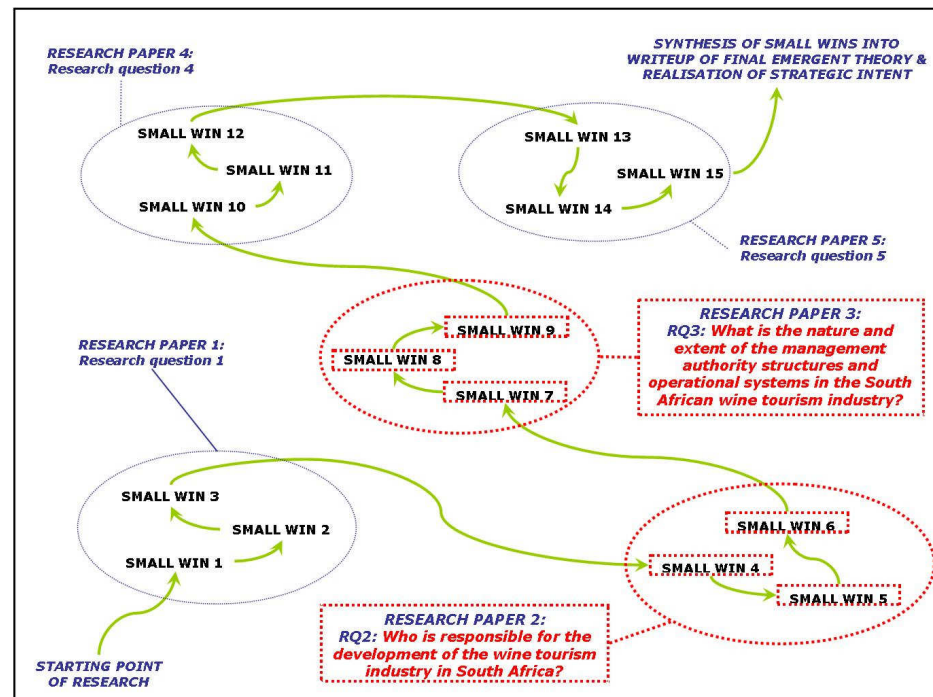
4.3 The authoritative management structure and developmental responsibility of the South African wine tourism industry (RQ2 and RQ3)

Having introduced and reviewed the identified significant developmental heritage and defining historical context of South African wine tourism development, the following section describes the continuing evolution of the research problem for this study. As highlighted in Chapter 1 and elaborated on and confirmed in the literature review, there is indeed a definitional complexity to “wine tourism”. And in terms of the preceding historical research, despite the emergent significance of wine routes, there remains evidence of a lack of clarity regarding the cognitive, organisational and industrial “fit” of the wine tourism, particularly in terms of the sector-specific wine and tourism industries. For although South African wine tourism’s initial historical development is revealed to be dominated by the wine sector; a recognised hierarchical structure of authority or clearly defined developmental responsibility for wine tourism was not readily apparent. As such, the full extent and nature of the wine tourism organisational structure and system is yet to be fully articulated for the South African industry. In other words, the wine tourism industry in South Africa appears to fall into an authoritative “grey area”, with its “fit” both as an industry and as a developmental responsibility remaining in question.

In recognising that the extent of this “grey-area” has yet to be outlined, the next research questions emerging from the continued research (RQ2 and RQ3) were further focussed and refined into *what is the managerial and developmental decision-making structure of the current South African wine tourism industry and what, if any, hierarchy of authority and responsibility exists?* By researching the structures and systems of authority, responsibility, communications and management for wine tourism within both the industrial sectors of wine and tourism in South Africa; the following subsections attempt to outline the identifiable nature and extent of the existing system of wine tourism management authority and developmental responsibility. Thereby providing insight and understanding into the systematic operation and industrial structure of the current industry within its unique developmental setting as revealed in the previous section.

This section summarily represents the results and findings of the second and third research papers conducted in this study. See the areas outlined in red in Figure 4.3.

Figure 4.3: Orientation of RQ2 and RQ3 results and findings within research framework and narrative process.



4.3.1 Perceptions of industrial authority and developmental responsibility in South African wine tourism (RQ2)

Initially the research assumed that the South African wine tourism industry had an identifiable and defined hierarchy of authority, responsibility and decision-making with regard to management and development. However, upon entering the research field and commencing the research process, it became immediately apparent that the structure of South African wine tourism was not as hierarchically formalized or systematically clear as originally thought. As such, the subsequent research was expanded in an attempt to capture a broad impression of wine tourism stakeholder perceptions regarding what organisations or entities are perceived to hold industrial authority and are responsible for the development of the South African wine tourism industry. Table 4.2 (overleaf) lists the open uncoded responses of study participants for this investigation who represent both the wine and tourism sectors, including wine

and tourism academics, wine companies, media publications, tour and service operators, wine route managers and wine producers.

Table 4.2: Organisations and entities perceived to hold industrial authority and be responsible for the development of the South African wine tourism industry, 2009.

| ORGANISATION OR ENTITY | NO. OF RESPONSES | PERCENTAGE |
|--|-------------------------|-------------------|
| WINES OF SOUTH AFRICA | 22 | 27.5% |
| NONE | 12 | 15.0% |
| WINE ROUTES | 9 | 11.3% |
| DO NOT KNOW | 9 | 11.3% |
| CAPE TOWN ROUTES UNLIMITED | 4 | 5.0% |
| PRIVATE INDIVIDUALS, PRODUCERS AND FARMS | 4 | 5.0% |
| SOUTH AFRICAN WINE INDUSTRY COUNCIL | 4 | 5.0% |
| SOUTH AFRICAN WINE INDUSTRY TRUST | 3 | 3.8% |
| SOUTH AFRICAN WINE TOURISM STEERING COMMITTEE | 3 | 3.8% |
| SOUTH AFRICAN WINE TOURISM FORUM | 3 | 3.8% |
| SOUTH AFRICAN TOURISM | 2 | 2.5% |
| WESTERN CAPE TOURISM BOARD | 2 | 2.5% |
| CAPE TOWN TOURISM | 1 | 1.3% |
| SOUTHERN AFRICAN TOURISM SERVICE ASSOCIATION | 1 | 1.3% |
| TOTAL | 79 | 100% |

From these initial research findings, one organisation was significantly distinguished by the stakeholders (Wines of South Africa), but what is immediately striking is the sheer number of differing organisations (15) identified from both the wine and tourism sectors, including organisations that no longer exist or currently function only in a very limited capacity (these are identified and discussed in the following sections). Such an irregular diversity of stakeholder impressions regarding authority and responsibility immediately suggests a degree of uncertainty and confusion within the industry in this regard. This is further supported by the shared third most common

stakeholder perspective being an admitted uncertainty (11.3% - “Do not know”). The fact that the second highest category (15%) was the stakeholder impression that there was no organisation (“None”) responsible for wine tourism development, further infers this evident lack of developmental clarity and responsibility.

However, although faced with overwhelming evidence from the reviewed literature and the ongoing research of an unclear and undefined hierarchy of developmental management and responsibility, the industrial sectors of wine and tourism were indeed identified as the capturing the overarching representation of stakeholders involved in the South African wine tourism industry. As such, each of the perceived wine and tourism sector organisations and entities were further investigated to identify and clarify the context of their perceived wine tourism industrial authority and developmental responsibility. The following sub-sections synthesise the findings of the conducted management interviews and sampled literature that was undertaken to this end, commencing with the wine sector.

4.3.2 South African wine sector: industrial authority and developmental responsibility in wine tourism (RQ2 and RQ3)

Upon initiating the investigation into the wine sector’s developmental responsibility and authoritative structure regarding wine tourism, it became apparent that the South African wine industry itself was subject to noted internal confusion and disagreement as to which body or organisation is representative of the wine industry as a whole (as introduced in the literature review). Therefore, the research was commenced at the highest conceived level of authority and developmental responsibility, for it was assumed that there would be some tier of government that would have an input or some form of official recognition, information, documentation, or indeed a formal response or referral regarding wine tourism development. However, from the identified and contacted sector-specific wine or agricultural departments (Department of Agriculture and the Department of Trade and Industry), no response on any wine tourism related inquiry was received from national or provincial levels of government. The only level of government to respond to continued communication efforts throughout the study regarding the wine tourism authority and developmental responsibility was a local municipality, which subsequently referred all research communications to the *South African Wine Industry Council* (SAWC).

SAWC was a national wine body established in June 2006, stemming from the restructuring of the no defunct South African Wine and Brandy Company and although SAWC did recognise wine tourism as part of the greater wine industry's interests, SAWC management expressly stated in response to this research question that the council had no legislative or recognised authority pertaining to wine tourism, nor indeed was or is there a national or central agency tasked with wine tourism development or management. SAWC's overarching function was identified as the harnessing of the different wine bodies in South Africa and to act as an intermediary between the South African government and the wine industry on relevant issues of statutory levies, transformation and trade policy (South African Wine Industry Council, 2007a). However, the fulfilment of these functions has in recent years been evidently undermined by the publicised political and organisational conflict and controversy surrounding the council, culminating in a spate of senior staff and member body resignations and current operational uncertainty as outlined in section 2.4.1 in the literature review (Castle, 2008; Joint Press Statement, 2008 and Robbins, 2008).

Similar issues of controversy and conflict also emerged when other wine sector stakeholder organisations identified in Table 4.2 were researched, such as the *South African Wine Industry Trust* (SAWIT). SAWIT is a wine industry transformation and commercial wine development and promotion organisation (South African Wine Industry Trust, 2006 & 2008), but is currently at an operational standstill, amid publicised financial, political and operational controversy with continued parliamentary investigation and public scrutiny, thereby negating any substantiated involvement in wine tourism development (Ensor, 2008; Farmer's Weekly, 2008; Fridjhon, 2007; Grape, 2008; Hamlyn, 2007; Morris, 2007a; 2007b; 2007c).

However, in terms of specific involvement in wine tourism though, SAWC described its own role as "*non-formalised*", explaining at the time that it served only supportive functions that included the likes of stakeholder guidance, industry monitoring, development verification and the issuing of a wine tourism development mandate. As evidence hereof, SAWC indicated in late 2007 it had extended this mandate for the co-ordination and development of the wine tourism industry to the *Wines of South Africa* company.

Wines of South Africa (WOSA), an international wine promotion organisation, was upon investigation revealed to have already served within the organisational structure of SAWC, with the task of generic market development, specifically for the domestic and export markets. But with the further mandate from SAWC in 2007, WOSA confirmed in its research response that it was also given “*the role of facilitating the development of wine tourism in South Africa*”. The apparent public knowledge of this mandate and the evident continued personal presence and representation of WOSA in wine tourism related activities could therefore account for the broad perception that they are the organisation responsible for wine tourism development (as indicated in Table 4.2).

However, from the continued interviews with SAWC and WOSA and supporting documentation, it emerged that the South African wine industry has no levy in place or dedicated funds available to directly contribute toward wine tourism development, nor indeed does the government evidently allocate any portion of the relevant income (tax, excise, etc) generated from the wine industry toward wine tourism. WOSA’s operational funds are generated from levies upon wine exports and these funds are expressly for their primary business of promoting the export and sale of South African wines in key international markets. As such, WOSA’s capacity to commit official support mechanisms and funding to wine tourism development is limited, and as a consequent, so too is its practical ability to fulfil the wine tourism mandate. However, WOSA evidently continues to involve itself in wine tourism in a communicative and informative capacity and also in the identifiable building and maintenance of a strong affiliation with the various South African wine routes.

The *South African wine routes* have already emerged from the research data as a key stakeholder and historical development driver, but as the research continued, they are also further revealed as widely recognised representatives of localised coordination and management of regional wine tourism operations in South Africa. From the research, it was discovered that the wine routes have independently developed management, communication, networking and marketing systems through strong professional and personal relationships and experience with various wine and tourism industry stakeholders and other wine routes. Summarily then, the wine routes exercise discretion over what wine tourism initiatives and projects are considered and

implemented in their respective regions based on their individual budgets and subject to the approval of their members. As such, wine routes emerge from the research as a central stakeholder of tangible wine tourism management authority actions and developmental decision-making responsibility: *“wine routes are the ambassadors of the wine tourism interests of their respective regions and their wine farming and producing members.”*

As introduced previously, South African wine routes are inherently comprised of various *wine producers and farmers* (the sixth most perceived entity in Table 4.2). As wine route members, the wine producers and farmers emerged from the research as integrally responsible for approving, funding and engaging in the marketing initiatives and development strategies as co-ordinated by their respective wine route management. Moreover though, whether they have route membership or not, wine producers and farmers have also clearly established themselves as the ultimate owners of the primary resource of the South African wine tourism product – the wine farms.

Thus the initially identified historical importance of wine farmers and producers in their evident catalysing of the first South African wine tourism and route movement is significantly magnified in their revealed ultimate control and discretion over the supply and shape of the wine tourism products and resources in South Africa. Combined with their evident representation of the operational capital and decision-making accountability of wine routes; wine producers and farmers have also revealed themselves as a central capacity determinant of wine tourism development and a primary influence on developmental direction and management. As such though, they thereby also arguably represent a principal degree of authority and responsibility in terms of wine tourism development.

Figure 4.4 (overleaf) graphically summarises the emergent authoritative system and structure of developmental responsibility within the wine sector organisations as identified in the research. The solid arrows between the wine routes and the wine producers and farmers indicate the emergent formalised associative networks in terms of recognised managerial decision-making and developmental responsibility confirmed in the research. The dotted lines indicate an identified but non-formalised

association or “facilitative” network regarding wine tourism developmental responsibility and authority, as evidenced and discussed above.

Figure 4.4: Wine sector involvement in the emergent wine tourism system of industrial authority and developmental responsibility, 2009.



4.3.3 South African tourism sector: industrial authority and developmental responsibility in wine tourism (RQ2 and RQ3)

Following the emergent lack of clear and structured involvement of government in the South African wine tourism system, it was then also expected that the identified “grey-area” of wine tourism developmental authority and responsibility was also to extend within the tourism sector. As with the wine sector, the initially perceived higher authorities in the form of government departments did not respond to ongoing wine tourism research and communication attempts. Relevant national government departments and agencies that were identified and contacted included the Department of Trade and Industry and the Department of Environmental Affairs and Tourism, however the only government entity to respond was the Western Cape’s provincial Department of Economic Development and Tourism (DEDT), but it must be stated

that the response was only after two years of extended attempts, arguably further indication of the prevalent confusion regarding wine tourism's developmental responsibility.

The DEDT was subsequently confirmed as the governmental department responsible for the facilitation of tourism development platforms (that included wine tourism). However, wine tourism has evidently only recently been actively recognised as part of the DEDT's updated Integrated Tourism Development Framework for the Western Cape (Department of Economic Development and Tourism, 2009) and the department recognises a duality of complexity and confusion regarding wine tourism's specific developmental responsibility and industrial structures. According to the department, this has subsequently delayed the process of formalising specific developmental policy, strategy or priority actions for wine tourism. As such, although specifically expressing an interest in leading developmental initiatives for wine tourism and evidently conducting an internal research and consultative policy process for wine tourism development, the DEDT does not as yet provide publically tangible wine tourism developmental support. This arguably explains why the DEDT was not identified by any of the respondent stakeholders in terms of wine tourism development responsibility in Table 4.2.

However, from the research captured in Table 4.2, two other identified provincial tourism sector organisations were subsequently revealed to fall under the oversight of the DEDT. Although comprising a relatively insignificant proportion (7.5% combined), *Cape Town Routes Unlimited* (CTRU), and the *Western Cape Tourism Board* (WCTB) also emerged as organizations perceived by stakeholders to be responsible for wine tourism development.

Upon investigation though, the WCTB was revealed to be non-functioning since it was absorbed into the general bureaucratic structure of the DEDT in 2004, further underscoring the lack of clarity and information within wine tourism stakeholder circles. CTRU (which replaced the WCTB) is currently the officially designated destination marketing agency for Cape Town and the Western Cape, and is funded by the DEDT.

However, although CTRU was evidently originally formed under the auspices of the Western Cape Provincial Government and the City of Cape Town, it further emerged in the literature and interviews that differing political controls and directions of these provincial directorates between 2007 and 2009 have significantly fractured CTRU's developmental efforts and public profile. Provincial political maneuvering, duplication of services, expressed public confusion, funding controversies and internal management and political conflicts have publically combined to undermine the agency's reputation and perceived contribution to tourism as a whole. Subsequently, in mid 2008, *Cape Town Tourism* (CTT) was publically announced as the new organization responsible for Cape Town's destination marketing as well as visitor and industry services (Herman, 2007; Dentlinger, 2008; Travel Industry Review e-News, 2008; Hartley, 2009; Makinana, 2009).

But despite the evident confusion and conflict that has emerged to shroud the provincial tourism sector agencies in terms of authority and function, there is a uniform clarity of purpose in the identified tourism sector stakeholders evident in the research. The focus of both CTRU and CTT's initiatives and documented roles are unanimously orientated toward a marketing function. As such, both organizations recognize "wine tourism" as part of the greater tourism product of their various constituencies and include it as part of their general branding and promotional activities and networks. Indeed, all the other tourism sector organisations identified in Table 4.2 present a consistency of business orientation, specifically in that their objectives and actions are all focussed towards the *marketing* of tourism. This was particularly evident in the identified national organisations, *South African Tourism* (SAT) and the *South African Tourism Services Association* (SATSA) in Table 4.2.

Although neither SAT or SATSA responded to any direct research communication efforts regarding wine tourism throughout the course of the study; from publicly accessible data and confirmed by other stakeholders, it became apparent that both organizations recognize the wine tourism industry from a tourist demand perspective, as part of South Africa's greater "tourism" offering. As national and provincial organisations though, it was expected that these identified tourism sector marketing agencies and organizations would have a more holistic focus on the tourism industry, and as such it was not surprising that industry and regional-specific developmental

decision-making and authority was not recognized as part of their explicit duties or responsibilities. The identifiable involvement of these tourism stakeholders in wine tourism thereby emerged to be broadly summarised as the provision of promotional platforms and general marketing activities.

However, the greater structure of tourism sector involvement with wine tourism in South Africa emerged to further extend into region-specific representation in the form of the respective *regional tourism offices*. These tourism centres and information bureaux, work under the broader associative network of CTRU and CTT, but differ in size and scale depending on the wine region they are located in with those in the larger more developed areas enjoying some local municipality funding, while others are independently operated and managed by local private individuals. The regional tourism offices primarily serve as the centralised contact point for visitors and as a marketing outlet for localised tourist attractions, destinations, services and operators in a particular area. Most significant though, as the research continued to investigate the tourism sectors involvement with wine tourism, a clear formalised corporate collaboration and established integration between the local tourism offices and wine routes was revealed.

From the stakeholder responses gathered in this research, it was evident that regional tourism offices in South African winelands often integrate their operations directly with wine route organisations, which were further specifically identified as “*the corridors through which the wine tourism product is accessed by tourists and visitors*”. The integration of these organisations was explained to usually occur in the form of some kind of corporate merger in terms of facilities, staff, duties, funding and marketing initiatives, which is agreed to be inspired by the shared wineland nature and setting of their mutual activities and the obvious financial savings.

However more significantly, the strength of personal and professional relationships and a cooperative understanding between the respective tourism officers and wine route managers was unanimously emphasized by stakeholder respondents as the primary foundation of these “wine and tourism associations”, particularly as such mergers and cooperation occur in an evidently unstructured and uncertain organisational environment. From this revealed interaction and function of the

regional tourism offices with the relevant wine routes, these localised associations arguably represent the primary source of tangible, active and formalised wine tourism developmental management and decision-making responsibility from a tourism sector perspective.

Figure 4.5 graphically summarises the emergent authoritative system and structure of developmental responsibility within the tourism sector organisations as identified in the research. The solid arrows between the regional tourism offices and the wine routes indicate the emergent formalised associative networks in terms of recognised managerial decision-making and developmental responsibility. The dotted lines indicate an identified but non-formalised association or “facilitative” network regarding wine tourism developmental responsibility and authority, as evidenced and discussed above.

Figure 4.5: Tourism sector involvement in the emergent wine tourism system of industrial authority and developmental responsibility, 2009.



4.3.4 The emergent integrated system of current South African wine tourism management authority and developmental responsibility (RQ2 and RQ3)

In the above descriptions and examinations of the research findings for wine tourism management authority and developmental responsibility, South African wine routes were initially considered in the context of the wine sector due to the revelation that they were established, and are funded by wine producers and farmers. However, the wine routes have further emerged within the tourism sector through their identified interaction with tourism organisations. Most significantly though, wine routes have also emerged from the research as the primary point of interaction between the distinguished wine and tourism industrial sectors. Although other cross-sectoral relationships and associative networks do exist as depicted in Figures 4.4 and 4.5, they remain evidently informal in structure regarding wine tourism developmental management authority and responsibility.

It is clearly apparent that “wine routes” are the recognised organisational structure that is directly vested and has an established role in both the wine and tourism sectors. And through their evident operation and function as the emergent cross-sectoral agent of wine tourism management and development, they also centrally clarify the identified “grey area” of authority and responsibility for the industry. This is significantly affirmed in more recent historical developments concerning the management and development of South African wine tourism, which were revealed in the continuing selective literature sampling and interviews hereto.

Specifically, in 2003 South African wine routes pioneered the first South African Wine Tourism Forum (WTF), as an effort to unite all those involved in the wine tourism industry. Also identified in Table 4.2, the WTF comprised of various stakeholders from both the wine and tourism industries, and initially acted as a communication platform for stakeholders. Most significantly though, the WTF, facilitated by CTRU and WOSA (representing a further instance of sectoral interaction), was instrumental in the preparation of a broad-based South African wine tourism industry development and management strategy in 2005.

However, according to former members of the WTF, “complications” arising from issues of funding, staffing, responsibility and political and regional representation

subsequently prevented the WTF and its subsidiary, the Wine Tourism Steering Committee (WTSC) (also identified in Table 4.2), from formalising their combined structure, function and authority. The WTSC was intended to serve as a further stakeholder communication platform. As a result, since 2007, the WTF has been non-functioning, (“*deep-frozen*” in the words of a former member), and the steering committee has been dissolved completely; thereby effectively halting these organisation’s efforts to refine and implement the drafted wine tourism development strategy.

However, despite the apparent environment of organisational inactivity that wine tourism development was considered to be left in; the central role that the historical and management investigations have revealed wine routes to play is subsequently further emphasized in their recent evidently recognised and tangible industry communication, coordination and action. More specifically, from the dissolution and effective developmental failure of the WTF and the WTSC, the wine routes have galvanised their emergent responsibility as the primary managers of wine and tourism sectoral interaction to form a new and functionally active, industry-wide coordination association called the South African Wine Routes Forum (SAWRF).

The SAWRF is a non-mandated organisation consisting of all the respective wine route managers and executive officers and includes a representative from WOSA. Operating on a voluntary basis through an open forum platform, the organisation meets every three months to promote an integrated and unified approach to wine tourism development by:

- setting wine tourism industry standards and developmental goals,
- sharing and coordinating schedules of wine tourism experiences, events, publicity efforts and campaigns,
- serving as wine tourism operational and management advisory, and
- the promotion of wine and tourism education and skills development (Pulse PR, 2009).

The SAWRF essentially serves as a collective communication forum and planning facility for the various wine routes, however most significantly for this investigation

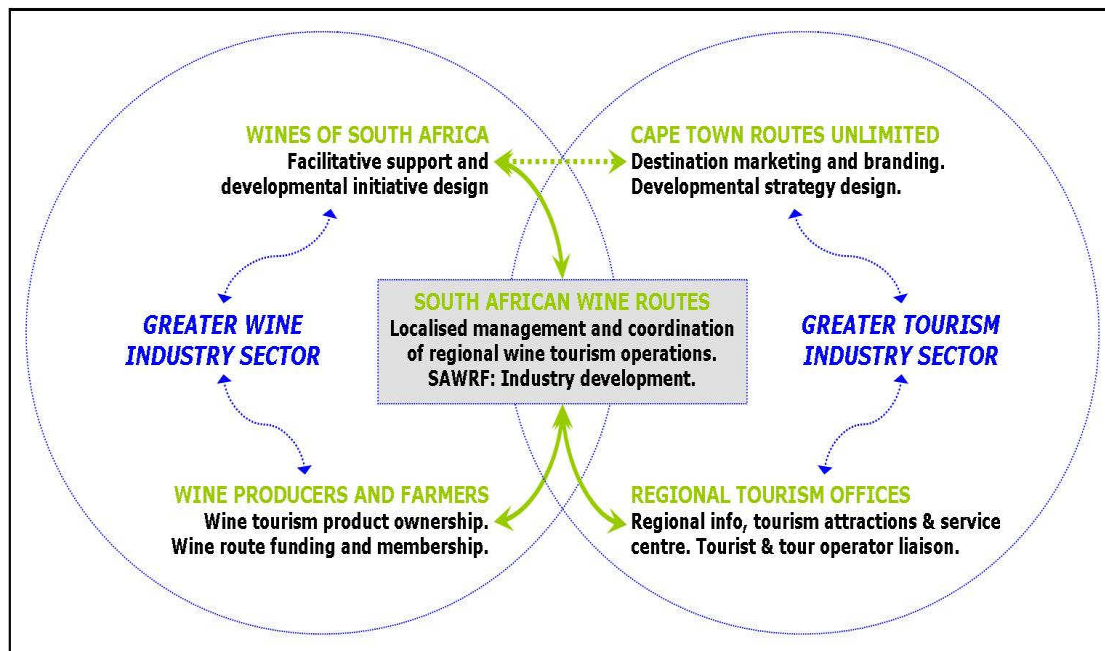
into wine tourism management authority and developmental responsibility is that in 2009, the SAWRF members confirmed an offer to take on the responsibilities of *“developing wine tourism in South Africa”*. Although an offer of goodwill, with the understanding that no funding is currently available, the SAWRF has agreed to distil tasks and directives from the existing (but currently latent and outdated) wine tourism strategy developed by the then Wine Tourism Forum, CTRU and WOSA in 2005, *“in an effort to expedite actual industry development with tangible results”* - thereby effectively taking responsibility for South African wine tourism development management and representing a decision-making body of authoritative stakeholders (Wine Tourism Strategic Workshop, 2009).

As such, although Table 4.2 indicates that WOSA is the most widely stakeholder-recognised organisation responsible for wine tourism development, from the continued research it has subsequently emerged that key stakeholders from both the wine and tourism sectors concurrently identify and recognise wine route associations as the most active developmental drivers and management decision-makers for the South African wine tourism industry. Stemming from the wine routes “recognised” oversight and management of the wine and tourism sectoral and stakeholder interaction, and in their unique emergence as the only organisational structure in South Africa with a “wine tourism-specific” operational and functional focus; the wine routes subsequently manifest and confirm themselves as the integrated hub of the South African wine tourism system.

In establishing this, the perceived “grey area” of wine tourism management authority and developmental responsibility introduced previously is effectively narrowed and clarified. For although multiple organisations from both the wine and tourism sectors recognise and identify with “wine tourism”, the research has unequivocally revealed that only a few key stakeholders are tangibly identifiable and actionably involved in the actual management and developmental activities of the current wine tourism system in South Africa.

Figure 4.6 (overleaf) graphically illustrates this emergently simplified stakeholder and organisational interaction with wine routes forming the integrated hub of both the wine and tourism sectors.

Figure 4.6: The emergent interaction of the most significantly active stakeholders identified in terms of wine tourism-specific industrial authority and developmental responsibility in South Africa, 2009.



4.3.5 Key findings and conclusions on the industrial authority and developmental responsibility of South African wine tourism (RQ2 and RQ3)

In considering the emergent development management and responsibility of both the wine and tourism sectors within the South African wine tourism industry; it is apparent from the research findings that both are indeed identifiably involved. However, it is also very evident from the research that the assumption of a universally perceived clearly structured authoritative system or “chain-of-command” hierarchy integrating both sectors was incorrect. This was initially suggested in the absence of articulated or documented state involvement in wine tourism development and further emphasized in the general lack of response to or acknowledgement of research communications from the highest levels of perceived authority for both the wine and tourism sectors, as assumed in the relevant national, provincial and local government departments.

However, although the expected form wine tourism hierarchy was not evident, from the research it did emerge that there are indeed recognised wine and tourism sectoral management structures and stakeholder systems that identify an association with the wine tourism industry. The greater proportions hereof though, were revealed to be only of an informal or communicative nature and extent. And although both the tourism and wine sector stakeholder respondents acknowledged that wine tourism was associated with their respective industry, the majority of evident systems and channels emerged to be primarily “facilitative” and not explicitly directive or supportive in terms of wine tourism development management and responsibility.

The evident involvement each sector (wine and tourism) with the respective other can collectively be argued as the difference between being in the *business*- and being in the *industry* of the other (Leiper, 1989 cited in Bruwer, 2003). For although many wine sector businesses, associations and segments of the economy are recognised to benefit from the tourism aspects and elements of wine tourism, it is only those organisations with a direct relationship to tourists and/or who actually perceive their customers as tourists that become actively involved in tourism and its development (Hall, et al. 2000). Similarly, the tourism sector’s involvement in wine tourism is primarily product-defined; limited to product marketing, information channels and coordinated advertising initiatives and platforms. As such, the initially identified “grey-area” of wine tourism developmental management and responsibility was evidently narrowed to the identified tangible actions and efforts of a emergent few wine tourism stakeholders, centralised around the South African wine routes.

However, although the majority of identified involvement in wine tourism was revealed to be not specifically vested in development or management operations or responsible therefore, it can also be argued that those identified wine tourism stakeholders from both sectors such as SAWC, WOSA, SAT and CTRU have been and evidently still are involved in developing South African wine tourism, only on differing levels as part of the evidenced greater wine tourism system. Indeed, it was unmistakably expressed in stakeholder interviews that both the wine and tourism sectors in South Africa demonstrate a clear “recognition” and “interest” in local wine tourism. And as such, it can also further be argued that both sectors then have an inherent responsibility toward the management and development of the industry. But

as exemplified in the WOSA research; even with the initial mandate from SAWC and a relationship with CTRU and the SAWRF, the organisation remains without financial or human capacity to leverage these toward wine tourism development or integrate them with their primary functions and duties.

The relevant discovery that “wine tourism” per se, is not the core function of any of these respective wine and tourism sector organizations has overshadowed the entire research into developmental and managerial responsibility, and as a result, all of the relevant organisations and entities stress that any wine tourism-related activities that they undertake are only planned, budgeted for- and implemented according to the available capacity of staff, time, financial and commitment. These prevalent limitations are further emphasized in that those organisations that are indeed specifically vested in wine tourism management and development, such as the regional tourism offices and wine routes, are in fact regionally limited or restricted in their activities and funding. They are evidently held accountable to the interests of their investors and members and thereby bound to the inherent locational or membership delimitation of priorities and responsibilities.

Significantly then, the lack of clarity regarding South African wine tourism’s industrial “fit” introduced at the start of this section has emerged to be rooted in a continuing confusion regarding where wine tourism’s developmental responsibility lies, exacerbated by a conflicting diversity of stakeholder perceptions regarding their own degree of involvement and interest in wine tourism - underscoring the undefined and broadly misunderstood nature and extent of wine tourism in South Africa. The emergent situation is also further complicated by the recent political and organisational conflict and dissolution which has undermined the representation and greater management of both the wine and tourism sectors, where the operational efficacy and reputation of both the South African Wine Industry Council and Cape Town Routes Unlimited has been significantly affected, following a spate of publicised resignations and financial and political controversies.

On a macro-level the sheer number of departments, agencies and organisations (as suggested in the size and diversity of Table 4.2) compounds the confusion regarding

wine and tourism industry development as each exercises and promotes their own developmental perspectives, policies and processes.

Summarily then, this section has revealed a greater stakeholder authoritative hierarchical vagueness concerning wine tourism development management and responsibility in South Africa. However, despite an evident environment of authoritative confusion and uncertainty, the local wine tourism industry has evidently continued to develop and grow on the private initiative of individual stakeholders. This is most specifically identified in the emergent management responsibilities and stakeholder-perceived authoritative recognition of the regional wine routes. Emphasising the importance of determined individuals and organisational cooperation, wine route associations have subsequently emerged as the core organisational structure of South African wine tourism in their functions as the *“corridors through which the wine tourism product is accessed by tourists and visitors”* and as the *“ambassadors of the wine tourism interests of their respective regions and their wine farming and producing members”*.

Wine routes thereby integrate both the wine and tourism sectors and form the epicentre of the emergent industrial management systems and corporate structures through which wine tourism developmental responsibilities and decision-making are tangibly and actually actioned. The coordination of this emergent role of wine routes is most emphatically embodied in the recent formation of the South African Wine Routes Forum (SAWRF), whereby its various members voluntarily participate and cooperate on operational initiatives in the face of the identified bureaucratic and hierarchical uncertainty.

However, although the wine route associations are evidently paving a new unified road for wine tourism partners and stakeholders to follow through the voluntary collaborative efforts of the SAWRF, there are a number of emergent industry realities that temper the feasible developmental capacity and authoritative ability of this organisation. In terms of the SAWRF's internal and operational structure, it remains a voluntary association, and from the research participants it was revealed that the current collaboration of unified marketing and operational initiatives among SAWRF members is mostly attributed to the strength of personal relationships and collective

determination and patience rather than a broader industry stakeholder buy-in. And although the individual members are displaying significant cooperative spirit and ingenuity, they are ultimately still remain subject to the will and funding of their own geographically and financially dispersed organizational members, i.e. the wine producers and farmers of their respective routes.

In other words, although the SAWRF has offered to take up the South African wine tourism developmental responsibility; with no dedicated direct support or funding, all current development activities and initiatives are therefore ultimately sourced back to the funding and capacity enabled by wine producers and farmers, with corporate sponsorship and the facilitative support of the various wine and tourism sector stakeholders identified as playing only a secondary role.

This revelation from the research is a critical point of concern in addressing the developmental future of the local wine tourism industry in terms of management authority and decision-making responsibility. For although wine routes may largely be perceived as the driving force of wine tourism in South Africa, it is has also clearly emerged from the research that the wine routes themselves are ultimately governed by- and accountable to their wine producers and farmers members, affirming and re-emphasising their identified importance as the primary resource supply base of the industry in terms of funding and capacity.

4.4 Primary employment and practical implementation of wine tourism in South Africa (RQ4)

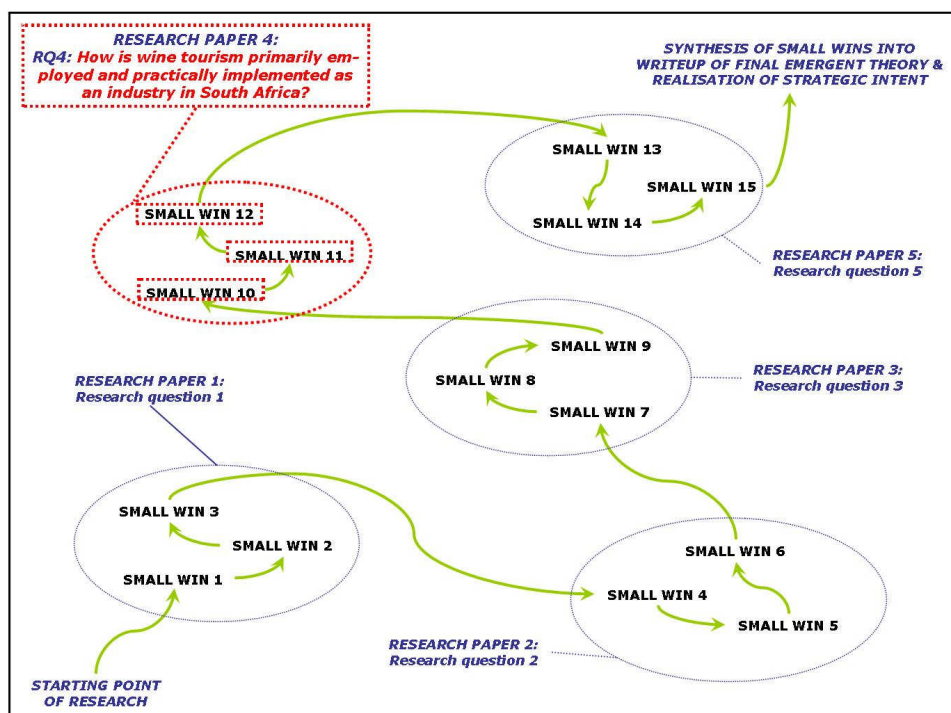
From the gathered documentation, observations and conducted interviews, wine routes and wine farmers and producers have emerged as the key drivers of the historical and managerial structure evidently responsible for supervising and facilitating the development of South African wine tourism. With the continued confirmation of their importance was revealed in the ongoing research however, the researcher also became increasingly aware of how little actual understanding or contextualised knowledge of the current operation, function and experience of these key emergent role-players within the local wine tourism system they personally

possessed or indeed had been addressed in this study. As such, the next research question emerged to tackle this evident knowledge shortfall and to flesh out the understanding of these central and critical industry management authorities. In grounded theory terms, the research was focussed to further add to the completeness of the developing theory on wine tourism development in South Africa.

As such, the guiding research question of *how is wine tourism primarily employed and practically implemented as an industry in South Africa?* (RQ4) was thereby refined to incorporate the guidance and orientation of the ongoing data gathering and analysis as introduced and explained in the preceding sections into *how do the wine farmers, producers and wine routes practically implement and operate the industry of wine tourism in South Africa?* The following sub-sections describe and examine the research findings hereto.

This section summarily represents the results and findings of the fourth research paper conducted in this study. See the area outlined in red in Figure 4.7 below.

Figure 4.7: Orientation of RQ4 results and findings within research framework and narrative process.



4.4.1 The primary supply of the wine tourism product: Wine farm case studies

To address the evolved research question regarding wine tourism's practical implementation, the focused research commenced at the identified and data confirmed primary supply level – the wine farmers and producers. And to further understand the increasingly evident importance of wine producers and farmers in the development and management of wine tourism, it was clearly necessary to identify and contextualise the nature and setting in which they indeed actively engage their role in wine tourism. To this end, a case study investigation was undertaken to uncover the understanding, experiences, motivations, perspectives and ultimately the roles of “wine tourism” on wine farms in South Africa (as explained in Chapter 3).

Three case farms were identified, each representing a designated farm category:

- Category 1: wine farm offering a small-scale wine tourism operation.
- Category 2: wine farm offering a medium-scale wine tourism operation.
- Category 3: wine farm offering a large-scale wine tourism operation.

The case farms were selected in conjunction with consultation and recommendation from the relevant local wine route and tourism bureau management authorities. Each of the individual farms representing each category were selected from a single wine region facilitating comparability by feasibly negating climate, terroir, market access and public services differences through an inherently shared locality. Furthermore, only farms with wine route membership were considered, as this was identified as a good unilateral indicator of a conscious and purposeful decision to actively engage in wine tourism on the part of the wine farm management.

As a widely recognised wine region and popularly considered the centre of the greater South African wine and wine tourism industry, the Stellenbosch wine region was selected as the study area for this specific investigation. As indicated in the literature review and preceding sections, Stellenbosch is home to South Africa's first wine route, and is moreover explicitly documented as experiencing “the most dramatic increase in wine producers” (Preston-Whyte, 2000: 105). Indeed, the Stellenbosch wine route currently has a membership that constitutes almost 35 percent of all wine route members in the entire South African wine industry (see Table 4.1).

Furthermore, the Stellenbosch wine region is stated to host up to 1.2 million visitors a year (Barnard, 2004). Summarily, the area was chosen as it is also generally recognised as having the most influence in the South African wine tourism industry (Bruwer, 2003), thereby establishing itself as a suitable and appropriate study area for this particular case study investigation as part of the ongoing application of the grounded theory methodology.

As the three case studies were conducted, it was evidently revealed that each of the wine farms from the respective study categories depicted three different and distinct wine tourism products, initiatives, perspectives and wine tourism management strategies. Several prevalent themes emerged from the case study data and are described in the discussion of the relevant case farms below.

By way of a contextualising introduction, Table 4.3 (overleaf) summarises each of case farm's gathered data into a coded and categorised wine tourism farm profile, thereby representing their practical implementation and operation of wine tourism as reflective of the scope of wine tourism for wine farms and producers in South Africa. The sub-sections that follow Table 4.3 examine and discuss the respective case study farms data.

Table 4.3: Emergent wine tourism farm profiles per case study category, 2009.

| | FARM CATEGORY | | |
|---------------------------------|--|---|--|
| THEME | SMALL | MEDIUM | LARGE |
| WINE ROUTE MEMBERSHIP | YES | YES | YES |
| OPEN TIMES | WHEN AVAILABLE AND BY APPOINTMENT. CLOSED SUNDAYS, GOOD FRI, CHRISTMAS, NEW YEARS | GENERAL BUSINESS HOURS. OPEN EVERYDAY EXCEPT SUNDAYS. CLOSED GOOD FRI, CHRISTMAS, NEW YEARS | GENERAL BUSINESS HOURS. OPEN EVERYDAY. CLOSED GOOD FRI, EASTER SUN, CHRISTMAS, NEW YEARS |
| FACILITIES | WINERY, GUEST HOUSE | WINERY, TASTING AND SALES CENTRE, VISITOR FACILITIES, CELLAR TOURS | WINERY, TASTING AND SALES CENTRE, VISITOR FACILITIES, CELLAR TOURS, RESTAURANT, SHOP |
| STAFF | OWNER (WHEN AVAILABLE) | TRAINED PERMANENT STAFF AND TEMPS | TRAINED AND MULTI-LINGUAL PERMANENT STAFF AND TEMPS |
| TASTING FEE | YES | NO | YES |
| PRIMARY MOTIVATION | LOW COST POINT OF SALES | WINE BRAND BUILDING | ESTABLISHING PREMIUM WINE TOURISM DESTINATION |
| DEVELOPMENTAL TENDENCY | COMMODIFY AVAILABLE FARM RESOURCES | MAXIMISE EXISTING TOURIST FACILITIES | PROACTIVE TOURISM EFFORTS AND TARGETED DEVELOPMENT |
| PERCEIVED KEY TO SUCCESS | DIVERSE ATTRACTIONS | PROFESSIONAL STAFF | TOTAL WINE TOURISM EXPERIENCE |
| FUTURE VISION | ESTABLISHING VISITOR FACILITIES | IMPROVE BRAND AWARENESS AND FOCUS ON WINE SALES | SECURE PREMIUM BRAND IMAGE |
| CONCERNS | FINANCES | OVER-COMMERCIALISATION | LACK OF COMMITMENT TO TOURISM SERVICE AND PRODUCT QUALITY |
| SUMMARY OF ROLE | TOURISM IS USEFUL BUT NOT FARM PRIORITY | TOURISM IS IMPORTANT BUT WINE REMAINS KEY FOCUS OF FARM | TOURISM IS PILLAR OF FARM SUCCESS |

4.4.2 Case Study 1: Small-scale wine tourism farm operation

The wine tourism product as supplied to the wine tourist on the smaller scale category 1 case study farm is of a relatively limited nature. Fundamentally, it is a winery and a cellar. There is no specifically designed or designated tasting area, with the farm owner (also the winemaker) conducting wine tastings and sales inside the winery according to appointments made by the visitor and depending on his availability as there is no permanent tasting or sales staff. However, the farm owner recognises the importance of “wine tourism”, most specifically as a sales and marketing tool, estimating that the farm’s cellar-door sales are up to 60 percent more profitable than

sales through retailers and agents. The owner further identified a sales “*knock-on effect*” in that getting more feet to his winery inherently raises brand awareness by “*putting a face to the wine label*”.

Although certainly acknowledging the economic importance of wine tourism, the category 1 farm owner also recognises that the modern wine tourist has many tourism options in wine regions and thereby emphasises that he perceives a need to diversify the wine tourism product and visitor attraction on his farm to remain competitive. He identifies three core elements that he believes work in synergy within wine tourism: wine, food and accommodation. However, although the farm does have a guest house; he admits that it was originally built as an independent money-earning entity, and was not intended as a complimentary tourism operation to the more established winery. However, after two years of running the guest house though, a positive spin-off was noted in that the majority of guest house visitors tasted and bought wine.

From this experience the owner has stated an intent to embark on further wine farm developments, with suggestions of a restaurant or conference centre. However, the owner highlights that the financial costs hereof are currently prohibitively expensive and moreover, in the event that capital became available and such facilities were constructed, he states that he would lease them out rather than running them himself as he identifies his lack of appropriate business knowledge and experience in such enterprises. Particularly as he considers them to be very different to making and selling wine and more emphatically, he believes such responsibilities would hinder his primary role as farmer and winemaker.

4.4.3 Case Study 2: Medium-scale wine tourism farm operation

From the outset, management of the medium-scale category 2 case study farm emphasized that the core focus of all farm operations is specifically focused on “wine” and the quality thereof. Indeed, “tourism” is expressly considered a secondary industry, used to promote the primary industry of wine. “*Wine tourism is only part of the greater wine marketing strategy and not the core focus of the farm. Indeed, the majority of the farm’s marketing budget is spent on direct promotion of our key successful wine range. Tourism activities are a complimentary to the farm’s success, but they are not responsible for it, nor do they drive it.*”

As such, the visitor facilities are purposefully wine orientated, with no other side-enterprises. But management does stress the recognised importance of the domestic tourist market, deeming it vital to the sustained commercial success of the farm, going on to highlight the considerable cost and effort that has gone into the local décor and attractiveness of their wine-focused visitor facilities. *“The tasting centre was specifically designed to make tourists feel comfortable - a comfortable tourist is a relaxed visitor, who is a satisfied customer, who is someone who will spend money”*.

The farm therefore has a well developed and dedicated wine tasting and sales facility, separate from the cellar and winery with full-time staff, all of whom undergo formal wine training. Furthermore, educational cellar tours and special group arrangements such as meeting the wine-maker are also available upon prior arrangement.

The category 2 case farm’s management summarised that wine tourism is an important component of their greater wine business, purposefully engaged as a brand building exercise and as a logical, cost effective point of wine sales. Furthermore, management does consider that their opening of the farm to the public adds a sense of place to their wine – *“people remember where they have been more than what they drank”*.

However, although acknowledging the value of the farm’s visitor facilities, farm management states that there are currently no plans to further develop or expand them, explaining that large-scale farm tourism requires a lot of time, energy and money - a collective cost that the farm management is not willing to incur. But management did conclude by pointing out that they are aware of the greater choice of attractions offered to potential tourists and admits that a small scale diversification of the wine tourism product using the farms natural resources is an issue currently under review.

4.4.4 Case Study 3: Large-scale wine tourism farm operation

The large-scale category 3 case study farm presents an extensive and diverse wine tourism product. It has substantial and diverse visitor facilities with a large wine tasting and sales facility, separate from the actual winery and cellar, as well as a restaurant and a retail shop with farm and wine related merchandise and souvenirs.

The visitor facilities offer comprehensive tourism amenities such as extensive seating, toilets, large-scale parking for multiple vehicles including tour busses and accessibility for the disabled. Cellar tours are offered and conducted at regular times and a range of unique inherent farm characteristics such as the farm's individual heritage and natural setting are commodified into tourism features with the likes of vineyard tours, walkways, displays and historical descriptions at particular points or objects of interest. Furthermore, all of the visitor facilities (wine tasting and sales centre, restaurant and merchandise shop) have permanent, multi-lingual and qualified staff with all employees evidently being graduates of wine or marketing and having undergone further in-house training.

Over-arching the entire wine tourism product as offered on the farm though, the owners and management stress the importance of top standards of service and professionalism. *“Wine tourism is all about catering to the expectations and needs of the customer, not the wishes and timetable of the owners. Critically, all public aspects must be consistently top notch in order to ensure that the value of the tourism service and product reflects and validates the actual price you charge for wine”*.

The category 3 farm management does admit though, that this attitude is a product of many years of experience. Indeed, the farm initially engaged in wine tourism activities purely from a financial cash-flow need, identifying the convenience of the farm as a point-of-sales and the potential savings in excluding agent, distributor, retailer and transport fees. Today though, management highlights that *“wine tourism is the primary business strategy and activity of the farm. Indeed, the farm itself is the epicentre of the wine brand, and the most marketable resource that [management] possesses”*.

However, management is also quick to emphasise the complexity of engaging in wine tourism. *“The time that a tourist has in general is limited, and the time that a individual farm interacts with the tourist is even less. As a result the experience that a farm provides to the tourist is vitally important and the necessity exists to offer them as much as possible”*. But management further points out that a farm can only survive as a wine tourism destination if they offer what they are comfortable with, for in the modern market there is indeed a pressure to stay fresh and new; and embracing wine

tourism requires a lot of time and money and a service commitment. *“The danger lies in that if a wine farm spreads itself too thin, the standards drop and wine tourists have expectations of service and standards that need to be met. It is vital that management have 100 percent commitment to each and every aspect of the wine tourism product that is offered on a farm, thereby positively contributing to the total tourist experience”*.

This category 3 case farm’s management further underscored that wine tourism is an industry that does not exist in isolation. It is interlinked with many other industries and is sensitive to the diversity of elements that exist therein, most notably accommodation services, fellow wine tourism destinations and the local domestic tourism market, which management emphatically considers the key to ensuring continued wine and tourism success. *“Rather than adopting a competitive attitude, strategic tourism relations have been forged with various accommodation providers and neighbouring wine farms as part of a collaborative marketing initiative, building on the strengths of other industry participants in an effort to raise each others brand association and awareness, ultimately to attract and share more of the available tourist market”*.

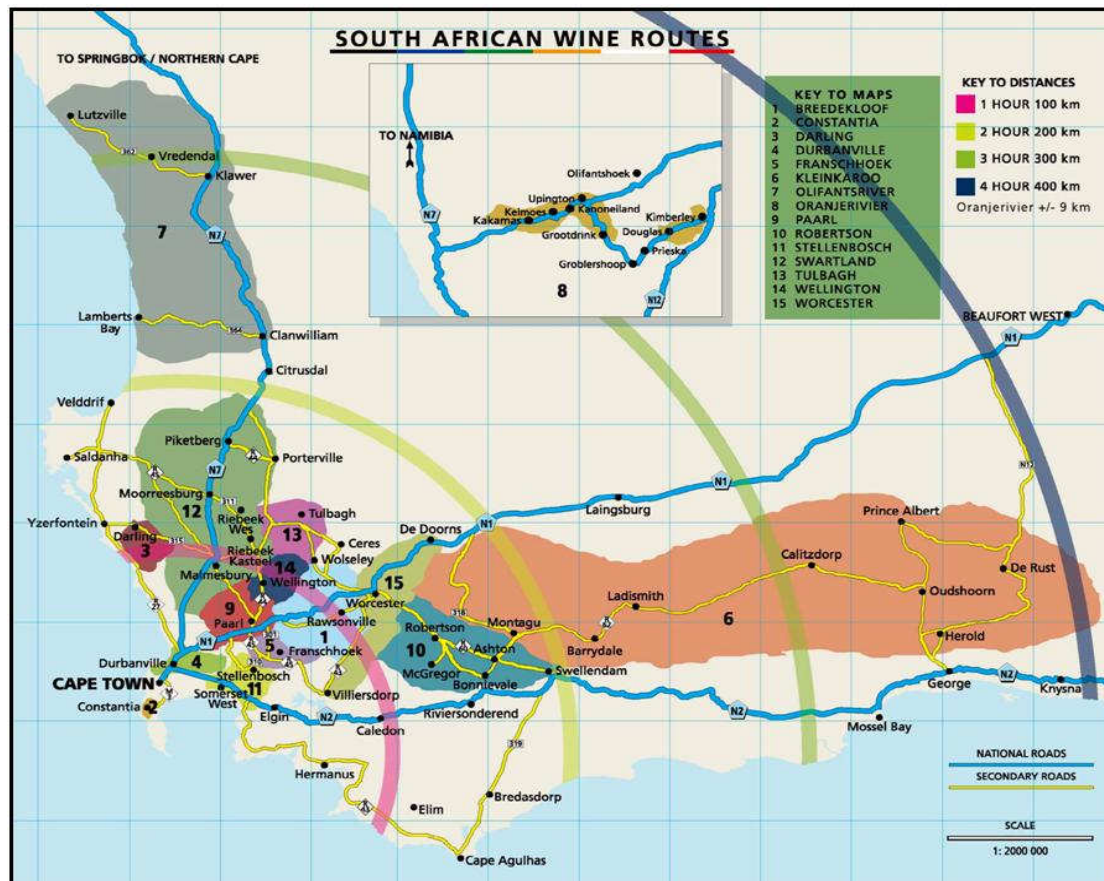
4.4.5 The primary management of the South African wine tourism product: wine routes (RQ4)

Having summarily introduced and examined a case study range of representative South African wine farms practically implementing and operating “wine tourism”, the subsequent orientation of the research extends to further such required understanding of wine routes. From the literature review and the findings in section’s 4.2 and 4.3 above, South African wine routes have already been introduced as the coordinating management structure driving organized wine tourism South Africa, as emphasized in their identified founding role of localized wine tourism and in their evident integrated developmental and managerial role in the greater wine tourism system.

However, as the nature and extent of the wine route’s importance continues to emerge in the local research setting, so too does the need to establish and understand how these organizations are actually structured and operate. In order to achieve this, 15 of South Africa’s officially recognized wine routes that comprise the current

membership of the South African Wine Route Forum (SAWRF) were contacted and interviewed (the location and distribution of which is illustrated in Figure 4.8). The following sub-section examines the research results of this investigation into the role, function and operational scope of wine routes within the South African wine tourism industry.

Figure 4.8: The geographical location of South African wine routes, 2009.



Source: South African Wine Routes, 2009.

Much in congruence to the topographical diversity and broad geographical distribution of South Africa's wine regions; from the gathered data, the South African wine routes display a significant range of operational and functional systems, each significantly adapted and determined according to their membership base, budgetary and human resource constraints and their relevant tourism market threshold.

In terms of internal organizational structure though, the routes are all evidently similarly headed by a board of directors or a form of executive committee or membership forum, whose strategic decisions are actioned and managed through a chief executive officer or route manager. The funding for which is provided in a diverse number of accountable ways. Of smaller quantity or short-term note, there are contributions of sponsors for specific wine route events such as festivals and individual donations from various corporate entities and individuals. On a longer term scale, there are larger corporate sponsorship deals for naming rights and route marketing agreements for specific and popular individual wine routes.

However, all of the route respondents consistently recognise the various member wine farms as the primary source of route funding. The costs of such wine route membership for farms vary from route to route, but they are predominantly calculated through a basic membership fee and a levy calculated according to the member farm's size and grape production tonnage.

However, although identifying the organisational and fiscal structures of wine routes; significantly for this study, the practical function and role of the wine routes remains to be explored and clarified. As such, through the respective relevant interviews (35 in total), reviewed documentation and continued observation of the wine routes and their management, key emergent functional and operational systems and responsibilities were identified to further the understanding of these evidently central wine tourism entities. They are categorically coded and summarised in Table 4.4 (overleaf).

The primary function of all of the wine routes evidently stems directly from the catalyzing farmer and producer motivation of wine and regional marketing and sales (introduced previously in Table 4.1). However, this marketing role of the routes emerges from the research to comprise of a three-fold promotional orientation including:

- region,
- member farms, and
- tourism product.

Table 4.4: Key emergent roles and functions of South African wine routes, 2009.

| | |
|--|--|
| MARKETING | Promotion: Region, member & product Website & Map Advertising Materials: press releases, newsletters, etc Sponsorships |
| COMMUNICATIONS & COORDINATION | Public Relations Information channel: industry, other routes & members General regional information Route sponsor liaison Tourism office integration |
| ADMINISTRATION | Strategic planning & operational meetings Finances & budgeting Regional wine certification Conflict management Level of member standards |
| EVENT MANAGEMENT | Wine event organization Route representation |
| COMMUNITY DEVELOPMENT | Social and environmental responsibility Community upliftment |
| TECHNICAL & SERVICE DEVELOPMENT | Production methods and technologies Farming and winery workshops Management training Cellar door service workshops |
| RESEARCH & ADVISORY | Member advice and assistance Cellar-door and Visitor research |

To this promotional end, wine routes are revealed to be responsible for the design, production and distribution of a variety of advertising materials that include route guides, pamphlets, flyers, maps, press releases and newsletters. They also notably maintain an individual route website, displaying a diversity of tourist-related information such as maps, photographs, visitor information and contact details for the route itself and its respective wine farm members.

Within this promotional orientation, wine routes are also primarily responsible for wine related event management and advertising for the regional delimitation of the route. Although, wine route management and individuals are also sometimes organisationally involved and representative of their routes in other regions and routes wine events, festivals, expos and wine award competitions and ceremonies, including some prevalent international events, but this is only according to available budget, personnel and time and indeed the strength of wine route inter-relations.

As part of the identified marketing function, but certainly not limited to it, wine routes also fulfil a communications and coordination role. Much like marketing, this role is evidently diverse in scope and varies in implementation across the various routes. From the research, the wine route management generally coordinates all internal communications and correspondence between member farms, route directorate, committees and affiliates. Wine route management is also responsible for general public relations, acting as a discussion forum and an information channel between member farms, other routes, and the wider wine and tourism industries.

Where applicable, management is further responsible for the negotiations and liaisons with corporate sponsors regarding their individual route and particular events such as festivals. Furthermore within this communicative role, wine routes have also, where possible, integrated themselves as part of the general regional tourism offices through establishing a formalised corporate collaboration or working relationship with local tourism bureaux and their management. As introduced previously in the examination of management authority and developmental responsibility, these mergers are generally motivated by a shared wineland setting, cost savings and through the strength of personal and professional relationships.

Wine routes also fulfil an administrative role. Aside from the obvious financial and budgetary planning and controls, wine route respondents indicated that they also are responsible for supervising member farm's regional wine certification and managing the general corporate infrastructure of the route itself, such as the formulation and implementation of route operation strategies and the organisation of the relevant board, committee and member meetings, depending on the structure of the individual route. Within this capacity, the wine routes are also revealed to act as a form of marshal for decided levels of service and further as a conflict management forum for members and the associated regional, community and industry role-players.

Within the localised communities, the wine routes also maintain a vested developmental presence. Through an identifiable operational consciousness of social responsibility and an awareness of the intrinsic wineland environment within which they function, wine routes are particularly supportive of community upliftment initiatives. This developmental orientation of wine routes also extends into the

technical aspects of wine production and tourism service as well. Hereto the wine routes evidently coordinate education workshops and arrange access to technical and management training programmes for members in a variety of fields such as cellar door service and wine production technologies and farming methods.

Wine routes furthermore exemplify a leadership role in their offering of a research and advisory service to members. This includes wine and tourism orientated advice and decision-making assistance for members and the planning and execution of appropriate cellar-door, visitor-profile and tourism market research.

4.4.6 Key findings and conclusions on the primary employment and implementation of wine tourism in South Africa (RQ4)

From the above sub-sections examining the current operation, function and experience of the emergent key role-players in the South African wine tourism system, there are indeed a number of themes and issues that have been revealed as central to the wine farmers, producers and wine routes as part of this study's evolving theory on wine tourism development.

Throughout the research across all the role-players, the issue of finances was universally apparent. Not only is it identified as a critical limitation to developing tourism facilities on wine farms, but it is also evidently the determining factor for the nature and extent of wine route activities and initiatives. The available finances and budget of farm owners and management clearly shapes the individual levels of tourism development on each farm and significantly, it furthermore determines the capacity of each of the wine routes, as their operation is also primarily dependent on the membership fees of the farms.

Herein the cardinal importance of the wine farmer and producer can be clarified as the direct financial resource determinant of the wine tourism product as offered to the public on wine farms, and the functional and strategic operational capacity of the various wine routes.

From the farm and producer perspective, the research moreover suggests that the perceived financial cost of engaging in wine tourism is evidently dictated by three cognitive elements that work in conjunction to shape the actual level of wine tourism engagement and development on wine farms:

- the degree of their understanding of the necessary tourism components of opening the wine farm to visitors,
- the degree of their commitment to a decided level of tourism activities, and
- the nature of their expected or anticipated return on investment.

As such, these factors represent the core pillars that determine the attitude and mentality of the wine farmer and producer regarding wine tourism as an industry and as a agri-business option. From the case studies, elements of this attitude emerged, particularly that farmers and producers consider the costs of engaging in wine tourism to be expensive, not only in terms of the capital outlay for developing farm facilities and commodifying farm resources, but also in perceived time and associated opportunity costs. For example, as expressed by one of the farm owners, the potential benefit of more wine sales is often superseded by the personal “cost” of having to work on weekends.

Moreover, it emerged from the case studies that “wine tourism” is widely considered a secondary industry. This was most clearly characterised in that the necessary tourism activities involved with opening the farm to wine tourist visitors are generally perceived to hamper or as an impedance on the primary wine production operations and duties of the farm and its staff. However, as a cost effective point of sale and wine brand builder, the broader utilisation of wine tourism at farm level was unilaterally recognised, as well as that the wine tourism “product” comprises of a diverse offering of attractions and tourism services.

And although the differences and varying levels of tourism services and facilities at the wine farms could be linked to the evident “secondary” or “less important” mindset; the opening of cellars and farms to the public with the associated diversity of farm-based attractions has clearly emerged as the recognised fundamental core of the wine tourism offering as delivered to the visiting public on the representative farms.

Each of the case study farms also identify the importance of the local tourism threshold market, where they all indicated from their experience that domestic tourists are vital to sustain wine tourism success at the local farm level. There is also unanimous agreement amongst the case studies that wine route membership is deemed as both a necessary association to make and as a useful and readily accessible form of brand exposure and marketing. As a result, the conception that wine routes are the central coordinating and developmental agency for the industry as a whole in South Africa is further reinforced, most notably when considered with the clarified managerial duties and tasks and the developmental responsibilities and initiatives revealed in the specific wine route research.

Although there is certainly evidence of a shared cognizance of the elements that comprise a wine tourism product and destination management and marketing, it is also very apparent that there are considerable disparities in the degree of understanding, attitude and level of commitment to wine tourism as a concept, industry, product and service. Indicatively, each of the case study farms presented different sets of expectations and individual comprehensions of wine tourism enterprise as exemplified in their identified diversity of priorities and functions.

Collectively though, the research clearly reveals that wine farmers, producers and wine routes are the central stakeholders and resources for the financing, development and coordination of the current South African wine tourism industry. However, the ongoing research has further emphasized the importance of wine farmers and producers as significantly more than just their role in the initial historical development of wine tourism by pioneering the establishment of the various wine routes in South Africa. Their importance is moreover magnified in the revelation that wine farmers and producers are evidently the “ultimate owners” of the wine tourism product as offered to the public.

The inherent significance hereof is captured in that they thereby dictate the look and feel of the wine tourism market through controlling the diversity of product offerings and experiences made available to visitors; without which those at an operational level, such as the wine routes and members of the SAWRF, would not be able to successfully carry out any sort of wine tourism marketing message. As such, in the

South African context, the research suggests that without the continued will, capacity and entrepreneurial spirit of wine producers and farmers, there may well have been no wine tourism industry to develop in the first place.

However, it is also apparent from the research that the importance of determined and entrepreneurial individuals is not limited to wine producers and farmers. It is clearly evident in the research and literature that operational management (on both the farms and within the routes) are the most prevalently recognised, actively involved and significantly responsible entities for the daily functioning of the wine tourism industry in South Africa.

Indeed, throughout the history of wine tourism in South Africa, each developmental initiative and progressive effort can be attributed to the forward thinking and determination of particular individuals. More specifically, it has emerged from the research that in the face of a structurally un-supportive system, South African wine tourism's development thus far can be intrinsically linked to the strength of the individuals evidently driving it.

Simply put, in the context of a confusingly perceived industrial hierarchy, a lack of tangible government support and a fragmented history, the success of wine routes and wine tourism destination farms in South Africa is therefore arguably determined by the character, commitment and attitude of their managers and staff. It can therefore also be assumed that the ready identification, development and retained employment of such dynamic, educated, market orientated and entrepreneurial individuals is critical to realising credible wine tourism leadership and encouraging a collaborative work ethic to further industry development and representation across all the various wine tourism offerings in all of South Africa's wine regions.

4.5 Challenges and limitations to South African wine tourism development (RQ5)

The key findings of the research have thus far primarily addressed the research problem of finding out *what is going on* in the South African wine tourism industry; specifically identifying the historical context of South African wine tourism development, revealing the current organisational structures and management systems concerning developmental responsibility and authority, and uncovering the key developmental and industrial drivers through the emergent importance and operational extent of local wine routes and wine farmers and producers.

However, in order to answer the primary research question of *why the wine tourism industry is not recognising its perceived potential*; the emergent research question (RQ5) of *what are the core wine tourism developmental restraints and stumbling blocks* remains to be expressly defined and described. As such, this section continues the data-grounded theory building process toward answering the research question of why is South African wine tourism not realising its perceived potential, by specifically pursuing a focused and fuller knowledge of the broad spectrum of limitations and constraints that stakeholders identify to prevalently exist and challenge wine tourism development in South Africa. Table 4.5 below alphabetically lists the abbreviated but uncategorised stakeholder responses that were gathered from 62 interviews for this refined research question of perceived developmental limitations and challenges.

Table 4.5: Identified South African wine tourism developmental restraints and stumbling blocks (uncategorised), 2009.

| |
|---|
| Apathy: industry waiting for someone else to do something |
| Bureaucratic inefficiency |
| Communication breakdown |
| Crime |
| Difficulty of transporting sold wine (delivery costs) |
| Distance: regions are spread out |
| Elitist perception of wine |

(Table 4.5 continues overleaf)

(Table 4.5 continued)

| |
|--|
| Exchange rate concerns |
| Fierce international competition |
| Foreign language tourists |
| Fragmentation: no one working together |
| Industry player in-fighting |
| Inefficient marketing |
| Insufficient impact on foreign markets |
| Insufficient industry knowledge and experience |
| Insufficient market share |
| Isolated industry |
| Lack of cohesion |
| Lack of collaboration with tourism and wine industry |
| Lack of competence and confidence in cellar staff |
| Lack of cooperation |
| Lack of credible body to drive wine tourism |
| Lack of entrepreneurship |
| Lack of funding |
| Lack of government intervention and assistance |
| Lack of government support |
| Lack of information sharing |
| Lack of monitored accreditation and qualifications |
| Lack of professional and service standards |
| Lack of reputation |
| Lack of research |
| Lack of training and education |
| Lack of trust between wine and tourism industries |
| Lack of understanding tourist demand, etc |
| Lack of unity among wineries, regions, etc |
| Lack of will |
| Lack of wine culture |
| Low quality service and untrained staff |
| Misguided and uninformed investment |
| Misunderstand and fear of wine |
| No central coordinating body |
| No generic marketing strategy |
| No national strategy |
| No professionalism |

(Table 4.5 continues overleaf)

(Table 4.5 continued)

| |
|---|
| No taking responsibility: all done by committee |
| No united South African brand |
| Not enough black development and transformation |
| Political bureaucracy and limitations |
| Poor service levels |
| Poor tour guide training and accreditation |
| Promotional materials |
| Racist image of wine industry |
| Snob image of wine |
| South African wine reputation: too much cheap/poor quality wine |
| Too many wineries working individually: competing |
| Too much emphasis on past |
| Too much politics |
| Too much talk and no action |
| Uncertainty of concept of wine tourism |
| Unclear return on investment in wine tourism: lacks justification |
| Wine is too expensive |
| Wine route bias: smaller routes forgotten |
| Wine tourism not seen as major roleplayer by government |
| Wineries don't see benefits of wine tourism |

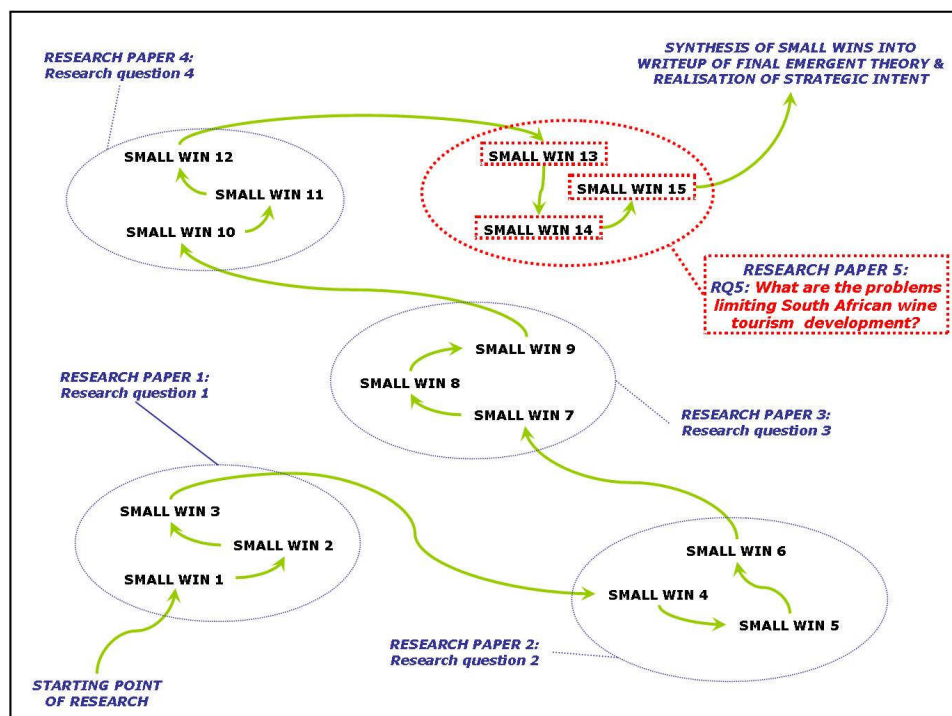
From these gathered interview responses, and supported by the sampled literature and observation, this section builds on the key findings of the previous sections and identifies and analyzes the emergent central challenges and limitations to South African wine tourism development. These emergent core restraints and stumbling blocks are summarised into five subsection categories of higher abstraction:

- Industry research
- Funding and capacity
- Government recognition, involvement and support
- Fragmentation
- Degree of understanding of wine tourism

Each category offers significant insight into the critical developmental issues currently facing the South African wine tourism industry and its development, thereby furthermore facilitating the identification of priority considerations for future actions to deal with, and plausibly solve, the overarching research concern of slow, disparate,

haphazard and uncoordinated development. This section summarily represents the results and findings of the fifth and final research paper conducted in this study. See the area outlined in red in Figure 4.9 below.

Figure 4.9: Orientation of RQ5 results and findings within research framework and narrative process.



4.5.1 Developmental limitation 1: Industry research

Despite the fact that South Africa has been producing wines for several centuries and the evident documented growth of local tourism, it has emerged from the literature and research that the wine tourism industry is still in a relatively immature stage of its development in South Africa (Preston-Whyte, 2000). As such, the industry remains at a pivotal developmental stage, critically requiring research and information on which to effectively operate and make strategic decisions, but unfortunately, it has also emerged that little of either is currently available in South Africa (De Kock Communications, 2005).

4.5.2 Industry research: Shortage of South African context

Compounding the South African wine tourism research situation is that until recently, there has been a dearth of applicable international research, with prior work considered out dated or irrelevant (Stewart, Bramble & Ziraldo, 2008). Furthermore, the majority of available scientific wine tourism research is formulated, conducted and published outside of South Africa, not only raising local accessibility issues, but also the diversity of differences that exist among the various researched regions evidently make it difficult to reliably or accurately compare regional data or correctly extrapolate data conclusions from one wine tourism region to another (Marzo-Navarro, M. & Pedraja-Iglesias, M. 2009). Although the international wine tourism research certainly provides insight for the South African industry, the combination of the lack of a clearly defined industry, the revealed authoritative and developmental responsibility confusion, and irregular and speculative market intelligence has led to South African wine producers and farmers and tourism operators having difficulties in distinguishing the actual level of interest and commitment of the wine tourist to their respective regions (Tassiopoulos D, Nuntsu N & Haydam N, 2004).

It further emerged from the research that those stakeholders who have invested in wine tourism activities have usually done so as a “leap of faith”, rather than from strategies formulated from market data and information (Loubser, 2004). Indeed, the few wine tourism market research efforts that were identified to be conducted in the local industry were revealed to be expensive, irregularly conducted and geographically dispersed. Such research initiatives in recent years in various wine regions and by wine routes have been dogged by several limitations and impedances: they have either been a single “once-off” exercise detracting from long-term comparisons and trend or pattern tracking, or have been indefinitely shelved as a result of a lack of stakeholder buy-in or cooperation stemming from an evident perception that research processes are complex and futile as well as a pervading misunderstanding of the objectives of the research itself. As a result of the irregular, inconsistent and fragmented nature of these research efforts, their credibility and impact is undermined not only in terms of the accuracy of the data, but furthermore in the perceived value and usefulness thereof for wine tourism stakeholders.

In an attempt to quantify the actual perception and situation of research within the South African wine tourism field, stakeholder respondents were specifically asked whether they believed that there is sufficient research and available information and data within the industry. Table 4.6 quantitatively describes the captured responses and confirms the perceived shortage of South African-specific wine tourism research and information.

Table 4.6: The perceived degree of conducted research and data accessibility in the South African wine tourism industry, 2009.

| DEGREE OF RESEARCH | NO. OF RESPONSES | % |
|--------------------|------------------|-------------|
| INSUFFICIENT | 40 | 78.4% |
| UNSURE | 8 | 15.7% |
| SUFFICIENT | 3 | 5.9% |
| TOTAL | 51 | 100% |

4.5.3 Industry research: Specific needs in South Africa

From the emergent insufficiency of general wine tourism research, two clearly defined central research needs emerged as further stakeholder sampling and response analysis continued:

- visitor information and statistics, and
- the return of investment.

Although expansive industry research was evidently identified as an overarching requirement, these recurring and specific needs were explicitly expressed from both the wine and tourism sector study participants. They significantly revealed a clear and urgent need to understand their target wine tourism markets, further confirming specific data and information detail priorities as *visitor needs, demands, expectations, motivations, preferences, numbers (volume), origins, movements and spending habits*. The apparent unavailability and inaccessibility of such localized data was revealed to have serious implications for the efficacy of wine tourism operations and the relevant actionable ability of decision-makers, and is evidently perceived as significantly

contributing to South African wine tourism's lack of governmental recognition and the sectoral industrial "grey-area" (introduced in section 4.3).

In terms of return on investment research, modern wine producers and farmers have emerged to be concerned by the financial "bottom line" of their enterprises, especially in the current evidently economically fragile wine industry. And although such fiscal issues remain a key concern for all stakeholders; for wine producers and farmers as emergent key central stakeholders already experiencing the economic strains and difficulties identified in the current wine industry, there is a widely expressed need for the incentive to financially commit to wine tourism initiatives and activities to be clearly and definitively quantified. Most specifically emergent was the perceived insufficiency of available and distributed information regarding the relationship between visitors to the cellar door and increased brand awareness and sales in the South African-specific context.

Summarily, the conducted research and reviewed literature revealed the return on investment for engaging in wine tourism to not be well researched, described or documented in the South African context and industrial setting, with the evident result that producers and farmers remain doubtful or unconvinced of the merits of both the financial and human capital investment requirements of wine tourism.

4.5.4 Developmental limitation 2: Funding and capacity

As emphasized in the above sub-sections, the issue of return on investment is of particular importance to wine producers and farmers. Indeed, the perceived costs and financial implications of successfully engaging in wine tourism activities have consistently recurred throughout this research, especially concerning the development of wine tourism destinations, products and services, with the case studies of wine tourism farm operations unilaterally revealing how wine tourism is perceived to require a lot of time and money with considerable commitment and opportunity costs. But from their further emergence as the primary financial resource for the South African wine tourism industry, the issue of funding has to be considered in the light of wine producers and farmer's broader fiscal situation.

4.5.5 Funding and capacity: Wine farmers and producers as primary resource

Although it is not the objective of this research to determine and discuss the financial state or condition of South African wine producers and farmer's, it is indeed evident that they are under "unparalleled economic pressure" with tremendous profitability and competitiveness concerns and the weaknesses of the general financing structure of the local wine industry being specifically identified in a number of wine sector benchmarking and performance studies (Blok, 2007; Cape Business News, 2008; Chironga, et al. 2006; Du Plessis, 2005, 2007; Ewert, 2005; Ponte & Ewert, 2007). And although financial constraints and economic variations are an inherent aspect of all businesses and industries, from the findings in this research, the general financial burdens and pressures on the wine producers and farmer's is of particular relevance as it provides significant insight into their identified reluctance to further stretch their monetary capacity by investing in wine tourism development initiatives.

However, this underscores the critical value of wine producers and farmers role as the primary source of wine tourism funding, especially in the light of such a demanding and essentially discouraging financial environment. It further emphasises the vital importance of their informed understanding of-, conviction in- and willing investment to "wine tourism" as an industry. However, the considerations of funding and capacity for wine tourism development extend further than the supply-side financial issues and concerns of farmers and wine producers. On a macro-developmental level, the lack of funding and associated direct support for the South African wine tourism industry is also evident in the research and has significant ramifications.

4.5.6 Funding and capacity: Macro industrial developmental determinant

Throughout the ongoing research, the lack of available funding for wine tourism development and associated initiatives is apparent – most emphatically exemplified in that the current organisation responsible for industry development and strategic co-ordination is a "voluntary-based" forum. And as further revealed throughout the previous sections, there are no significant funding sources identified outside of the regionally focussed wine producers and farmers. This emergent lack of broader, industry-orientated developmental funding has tremendous implications for the realisation of developmental plans, initiatives and strategies. Indeed, funding shortages are identified by study respondents as one of the primary causes for the

stalled and suspended developmental efforts of recent years in the South African wine tourism industry.

The sourcing of such funding is also further complicated by the identified lack of clarity regarding wine tourism's industrial "fit", as exemplified in the emergently continuing confusion regarding the industry's developmental responsibility and the conflicting diversity of stakeholder perceptions on their degree of involvement and interest in wine tourism. As one respondent summarised: *"There are many stakeholders, each fighting for a piece of the wine tourism pie and complaining how small it is, but no one is willing to pay for more or indeed to contribute to making a bigger pie as they do not wish to allow perceived freeloaders enjoying the benefits of their investment"*.

Without secure and dedicated funding, all marketing, coordination, collaborative and holistic industry development campaigns and strategies are effectively hamstrung through an inability to create, facilitate and maintain efficient and recognised systems of communication, responsibility and tangible action for wine tourism. Reliable and valuable research cannot be conducted, new industry entrants cannot be assisted, and of particular emergent importance; educated, experienced and sufficient personnel cannot be securely employed.

Summarily, as demonstrated over the last decade of wine tourism development and confirmed in the research data – the level of available funding dictates the executable scope of developmental plans and actions; not only in their strategic evolution, but also in their sustainable implementation, thereby significantly determining their actionable capability and discernable degree of success.

4.5.7 Developmental limitation 3: Government recognition, involvement and support

As has emerged from the previous sections, a key feature of South Africa's wine tourism industry is revealed in the apparent absence of government or state involvement, funding and support. Although strict state controls and regulation were historically revealed to have initially galvanized wine route and greater wine tourism development initiatives in South Africa; in terms of identifiable direct governmental

support, the departments and agencies from both the wine and tourism sectors are conspicuous in their general absence and non-responsiveness with regard to investigations into the involvement and responsibility for wine tourism in general, not to mention the development thereof.

4.5.8 Government recognition, involvement and support: South African context

The issue concerning state involvement in the development of the South African wine tourism industry is particularly evident when compared to the developmental experience of other international New World wine-competitor countries. As was revealed in the research and literature, the South African wine tourism industry established itself without any official support, capacity or funding from government or state departments or agencies – in dramatic contrast to wine countries such as Australia and the United States. Indeed, it has emerged from the research that the governments of the majority of competitive wine tourism destination countries have implemented dedicated wine and tourism development policies and structures to identify, invest in and support wine tourism possibilities. In South Africa however, wine tourism emerges from the research as a substantially unrecognized industry from a state perspective, as evident in the limited response and unidentified uncertainty of the wine tourism authoritative system that was characterized by multiple, and often conflicting, wine and tourism development departments, stakeholders and agencies, each with separate policies and differing understandings of wine tourism as an industry and also as a developmental responsibility.

However, this recurring “confusion” concerning developmental responsibility, authority and policy; is not limited to the wine tourism industry and as evidenced in the literature is indeed symptomatic of an identified national policy breakdown in South Africa. The literature review specifically identified how government was still struggling to find an appropriate re-engagement with the wine industry and further revealed the aggravating lack of intergovernmental coherence and policy at both national and provincial levels, which summarily contributes to the lack of stakeholder clarity and common purpose.

4.5.9 Government recognition, involvement and support: Direct funding

The most prevalent issues concerning this identified absence of government recognition, involvement and support for wine tourism are revealed most specifically in the research and literature as a lack of funding and support. Re-emphasizing the identification of available funding as a core developmental limitation for wine tourism, the South African National Tourism White Paper, the Western Cape Provincial Tourism White Paper, the Macroeconomic Outlook for Tourism for the Western Cape and the World Travel and Tourism Council all unanimously and specifically identify that there is inadequate government spending for tourism industry development in South Africa (Department of Environmental Affairs and Tourism, 1996; Department of Economic Affairs, Agriculture and Tourism, 2001; Department of Economic Development and Tourism, 2004a; World Travel and Tourism Council, 2002).

This identified lack of financial investment by the South African government has tremendous implications for the developmental capacity of the wine tourism industry, but is also an evidently growing issue in terms of stakeholder “expectation” and “frustration”, particularly with wine farmers and producers.

Considering wine producers and farmers emergent role as the primary funding resource for wine tourism development and operation; and given that a large proportion of wine producers and farmers available capital is determined by revenue from wine products; the research further revealed that the majority of wine tourism stakeholders have a prevailing expectancy of greater government support and involvement. This “expectancy” emerges from a readily evident perception among study respondents that the state’s current involvement and support in the wine and related industries (including wine tourism) does not equate to the value of its revenue.

To further explain the financially quantify this expectancy, Table 4.7 (overleaf) chronologically compares the wine producer’s income generated from wine products in South Africa compared to the state revenue generated from the same wine products.

Table 4.7: South African state revenue from wine products versus wine producer's income, 2009.

| YEAR | PRODUCER'S INCOME (MILLIONS) | STATE REVENUE (MILLIONS) |
|--------------|---------------------------------|-----------------------------|
| 1991 | R 653.10 | R 586.50 |
| 1992 | R 707.80 | R 654.50 |
| 1993 | R 692.20 | R 764.50 |
| 1994 | R 866.40 | R 1,085.90 |
| 1995 | R 963.20 | R 1,296.50 |
| 1996 | R 1,233.10 | R 1,612.80 |
| 1997 | R 1,462.50 | R 1,658.60 |
| 1998 | R 1,412.60 | R 1,668.10 |
| 1999 | R 1,435.90 | R 1,519.20 |
| 2000 | R 1,458.10 | R 1,484.20 |
| 2001 | R 1,595.70 | R 1,667.10 |
| 2002 | R 2,075.50 | R 1,836.50 |
| 2003 | R 2,576.10 | R 2,021.60 |
| 2004 | R 2,790.50 | R 2,330.90 |
| 2005 | R 2,625.70 | R 2,713.70 |
| 2006 | R 2,610.70 | R 3,075.60 |
| 2007 | R 2,852.50 | R 3,275.90 |
| 2008 | R 3,319.80 | R 3,459.10 |
| 2009 | R 3,648.90 | R 3,650.10 |
| Total | R 34,980.30 | R 36,361.30 |

Source: South African Wine Industry Information and Systems, 2007; 2008; 2009.

Although there is an arguable question surrounding whether or not state revenue from “wine products” necessarily warrants investment in “wine tourism” development; however, the identified lack of identified state recognition and absence of funding or investment in wine tourism development initiatives or actions emerges from the majority stakeholder perspective as “*entirely disproportionate to the amount of state revenue*”. This expressed expectancy of “*at least something for what the government takes*” is particularly emphasized by stakeholders in the context of the established inherent wine-related nature and wine sector dominated extent of the wine tourism industry, and moreover in the evidently established emergence of wine producers and farmers as the current financial foundation and primary resource of all wine tourism developmental and management activities.

4.5.10 Government recognition, involvement and support: Policy issues

It must be conceded though that the limited governmental participation in this research does make it difficult to draw reliable or unbiased conclusions explaining the emergently limited level of official state involvement and support in wine tourism. However, having said that, the limited response is in itself indicative of a prevalently recurring attitude to and clarity of involvement in the wine tourism industry. From the continued research and literature sampling though, a greater governmental department and agency disjointment was uncovered; in part as a result of the identified confusing policy environment and the differing developmental priorities of national, provincial and regional authorities, but also evidently due to the pervading lack of uniformed clarity regarding the whole of the tourism sector industry from a government jurisdiction perspective.

From the research, it further emerged that “tourism” in general is tremendously “fragmented” in the Western Cape. This was attributed to the size and diversity of the province in terms of tourism products and attractions, but moreover to the correspondingly sizable number and diversity of agencies, companies and stakeholders that have become involved - each with a unique set of expectations, objectives and priorities, especially in terms of governmental responsibilities and development. This complexity of multiply varied stakeholder input and perspective further convolutes the issue of state involvement due to the integrated nature of tourism industries and systems.

Specifically, it emerged from the research that elements of the vast diversity of activities and services that are considered to be part of “tourism” in the Western Cape, are often identified under the control and responsibility of different governmental departments, such as public works, safety and transport. As a result, even simple “tourism” developmental efforts, such as signposting, are often subject to the bureaucratic procedures of multiple governmental departments with considerable and lengthy time and approval process implications stemming from the possible jurisdictional and policy conflicts.

However, the South African government does indeed unanimously identify tourism industries as a strong pillar of national economic growth and has committed to

enabling a developmental environment for tourism (Department of Economic Development and Tourism, 2004a; Mabudafhasi, 2008). However, in terms of wine tourism, the industry has evidently not been considered as a priority in national tourism marketing activities, nor at regional levels where government departments have orientated growth strategies and state capacity elsewhere (Loubser, 2004). And it is only recently that wine tourism has been specifically identified as a “*niche tourism market*” as part of ongoing efforts to update the Western Cape’s Integrated Tourism Development Framework (Department of Economic Development and Tourism, 2009).

4.5.11 Government recognition, involvement and support: Political complexity

As introduced previously, with only the Western Cape’s Department of Economic Development and Tourism responding in this investigation, establishing the reasons and explanations behind the government’s emergent historical lack of recognition, involvement and support for wine tourism is a complicated task. However, one of the greatest complications surrounding such investigations is not simply a lack of response but the immediate emergence of wine tourism as an industry of “huge political contestation” (Dube, 2005). Deep fault lines of distrust have evidently run through the wine industry for many years in South Africa and the research and literature has revealed that past cooperative developmental efforts for wine tourism have been hampered by political conflict, transformational resistance and representative and leadership power struggles.

These evident political issues and sensitivities are further compounded by a widespread sentiment among wine stakeholders recognized in the research that “the South African government regard[s] the wine industry as [an] enclave of former white wealth” (Morris, 2007). This significantly challenges wine tourism developmental initiatives and vested organisations to not only successfully develop the industry, but also trying to balance and reconcile numerous different stakeholder and government agendas (Ewert, 2005).

There is also widespread speculation within the identified wine tourism stakeholders that the government remains uninformed of the industry’s economic contribution and future potential to realize the provincial and national government’s developmental

funding and development programs priorities such as job creation and poverty alleviation. Further concerns over insufficient transformation and black economic empowerment have also emerged as perceived deterrents to state support and funding, especially in the light of the available literature generally revealing both the wine and tourism sectors as insufficiently transformed (Mason, 2003; Department of Trade and Industry, 2009; South African Wine and Brandy Company, 2003; South African Wine Industry Council, 2007b). As a result, other tourism areas and industries are evidently believed by stakeholders to be identified by government as more “suitable” and with a higher national public profile with regard to addressing black economic empowerment, unemployment and poverty and therefore subsequently receive priority in terms of state consideration, manpower and spending.

4.5.12 Government recognition, involvement and support: Little incentive

Furthermore, government involvement and support for wine tourism development is also believed to be discouraged by the emergent historical failures and lack of private, corporate, labour and community integration and partnership between the various role players in South Africa wine tourism. From the limited available contemporary literature and the singular provincial government research response, there was however a clear statement that wine tourism is currently part of the greater provincial tourism development vision of the Western Cape government. But a much higher level of stakeholder consultation and convergence regarding wine tourism is critically and expressly required, particularly concerning both the governments and the private sector’s understanding and expectations of wine tourism. *“We need to put all those involved on the same page, reach a mutually understood set of requirements and objectives that can be clearly captured in a position paper or blueprint that will then outline the actual strategy to be followed to develop wine tourism.”*

Both the Western Cape government and other wine tourism stakeholders evidently agree that there has been a perpetuating lack of engagement from all parties and sectors involved though. Compounded by the general fragmentation of tourism policy and enterprise, and an extended heritage of privately driven and self-capacitated development - a sense of complacent stakeholder acceptance of the unintegrated wine tourism situation is evidently self-identified and admitted: *“where each stakeholder is apathetic to industry development and just gets on with there own thing.”*

But in as much as there is an identified expectation of greater government support from various stakeholders, there is also certainly an established and unanimous understanding that wine tourism development has and will continue to be fundamentally driven by the private sector, with government assuming a more facilitative role by providing the various platforms and systems to capacitate growth in the industry and market. However, this mutual meeting of industry and government has yet to be feasibly planned or tangibly actioned, for as reflected in the previous sections, there remains a bewildering diversity of stakeholders in a confusingly broad and undefined industry structure; each evidently working independently of one another, positioning themselves differently and lobbying different sets of objectives and interests.

This evident situation summarily continues to contribute to a fragmented and disincentivised conception of the wine tourism industry that is plausibly held by governmental development and support authorities, who are already revealed to be hampered by complex bureaucracy and controls, political agendas, multiple expectations and diverse priorities.

4.5.13 Developmental limitation 4: Fragmentation

Fragmentation emerged as a central category of concern that permeates the majority of the other identified issues inhibiting the realization of wine tourism's perceived potential in South Africa. In the context of the identified political conflicts, governmental policy issues, divided and unclear industry bodies, disparate organizational orientations, positions, titles and expectations - the concept of fragmentation initially emerged as a collective categorical representation of the identified industrial confusion, underlying uncooperative attitude and divided developmental apathy amongst stakeholders. As such a "collective" restriction then, fragmentation of tasks, responsibilities, efforts, marketing and cooperative initiatives thereby describes most of the evident widespread issues hampering wine tourism's popular optimistic future vision of unified collaboration and developmental growth.

4.5.14 Fragmentation: Historical influences and competition

In the context of the history of wine tourism development in South Africa, there is clear evidence of considerable conflict and risk with an identified private sector dominance. And as has been discussed, rather than enjoying state support and funding to develop wine tourism, wine farmers and producers in South Africa literally had to fight (in legal terms) to establish the first recognised manifestation of South African wine tourism (the Stellenbosch Wine Route). As such, in the currently noted and continued absence of centralised support systems, South African wine tourism is confirmed in the research to have developed on the “time”, “money” and “will” of private individuals, most specifically exemplified in the wine farmers and producers. Significantly, this has consequently encouraged a prevalently strong culture of both private and regional competition in the local industry, most palpably apparent between wine regions and routes.

This competitive nature of wine tourism, reinforced by farmers and producers revealed financial responsibilities and pressures, has been identified to have fragmenting ramifications for the development of South African wine tourism. Compounded by an industrial environment revealed to be characterised by a lack of trust and integration between the wine and tourism sectors; the evident reliance on the investment of competitive farmers and producers has lead to widespread and ingrained practices of non-collaboration between wine tourism stakeholders. This form of fragmentation is exemplified in a prevailing perception held by farmers and producers that wine tourism neighbours and business peers are to be considered as “enemies”, and they therefore subsequently remain sceptical of cooperative tourism marketing and collaborative development initiatives (Bannister, 2005; Morris, 2005).

It is arguably understandable that wine farmers and producers are protective of their individual wine tourism investments of money, time and energy, but the spill over of this “competitive protection” is the extensive pervasion of a non-inclusive and non-collaborative paradigm to conducting wine tourism business, which significantly dilutes the potential, and further fragments the efficacy of current and future cooperative development and marketing efforts.

4.5.15 Fragmentation: Absence of tourism principals

On a fundamental level, the research revealed that the basic building blocks of tourism such as cooperation and competitiveness are not sufficiently understood or practiced in the South African wine tourism industry. Wine farmers and producers have historically pursued their own interests with a production orientation, and as a consequence of the revealed fragmented environment of both the wine and tourism sectors, they have prioritized wine production and private investment preservation over tourism principals.

The situation is evidently further compounded by the perceived financial risks and costs of “collaboration” that also hedge the wine farmers and producers willingness to commit to “shared” developmental capacity. As a result, South African wine tourism is identified in the research and literature to enjoy very little coordinated development and has a market characterized by haphazard and fragmented product and destination development and disparate service levels, ranging quite literally from “extravagant to nothing” (Loubser, 2004).

4.5.16 Fragmentation: Organisational confusion and complexity

This fragmentation of destination and farm level development and initiatives also pervades the organizational structure of South African wine tourism. As introduced previously, the lack of integration and convergence between the “bewilderingly” large number of stakeholders and agencies in the tourism and wine industries has exacerbated the revealed authoritative confusion surrounding wine tourism. This afore-mentioned industrial “grey area” is further fragmented and muddled by allowing multiple wine and tourism sector agencies and organizations to claim, reject or pass over responsibility for wine tourism developmental initiatives and actions. And where hierarchical or authoritative chain-of-command could be identified in the greater wine tourism system, the majority of relevant stakeholder respondents agreed that they were characterized by *“tremendously frustrating levels of complex and ineffectual bureaucratic red-tape”*.

This identified disjointed organizational operation, interference and sometimes, indifference in the local wine tourism industry has, along with the revealed political and representation issues and policy uncertainties, evidently contributed to the delay,

derailment and fragmentation of the development plans and initiatives of recent years, such as those of the Wine Tourism Forum and the Wine Tourism Steering Committee.

Such is the greater emergent fragmentation of the South African wine tourism industry that it is revealed to extend and infiltrate all levels of wine tourism development and management research and discussions. Considering the revealed history of misleading industrial protection, international isolation, reliance on private capital output and investment, considerable personal, political and legal conflicts, and confusion surrounding the structure, practices, priorities and expectations of wine tourism; it is indeed readily conceivable and arguable understandable that wine tourism in South African is evidently “fractured” with a culture of internal preservation and a prevailing lack of communication and cooperation between stakeholders.

4.5.17 Developmental limitation 5: Degree of understanding of wine tourism

Although “fragmentation” categorically encompasses a central variable of wine tourism developmental limitation, it was revealed to be more of a “symptom” than an actual “behaviour”. And as the study continued with focused selective research and literature sampling, a central pillar that underpinned all of the revealed developmental limitations and concerns emerged - providing significant insight into the limitations themselves and further postulating a possible reason therefore. This central pillar or category of research data and information is essentially summarised as a fundamental misunderstanding and misconception of wine tourism that is evidently revealed to permeate the broader South African industry.

4.5.18 Degree of understanding of wine tourism: Conceptual confusion

This misunderstanding is initially apparent at the wine tourism product and destination level; significantly in the identified conceptualisation and operations of the industry’s primary drivers of wine farmers and producers. Most prevalently revealed in the research is the varying degree of their understanding the principals, role and potential of wine tourism, for as a agri-business in South Africa, it continues to be perceived as “secondary”, with vastly differing levels of investment and commitment evident throughout the various wine regions. The emergent disparity of facilities, investment and development evidently identified at wine farm’s “cellar door” is

revealed to stem from recognition that although winemakers are interested in improving cellar door sales, the tourist is looking for more – “a total experience” (Loubser, 2004). The situation is further evidently aggravated by inconsistent levels of “critical tourism elements” such as consistent service, quality and professionalism across regions, routes and estates.

4.5.19 Degree of understanding of wine tourism: History and production mindset

This apparent lack of cognition and comprehension of especially the “tourism” business aspects of engaging in “wine tourism” was introduced in the fragmented farm levels of wine tourism development, but the ramifications of the greater misunderstanding of wine tourism extend further in the research. It is also attributed to the sustained diffusion of a widely identified wine “production” mentality and focus that permeates the majority of the industry’s operations. With the business of wine tourism operations evidently so narrowed upon wine production, this emergent production orientation has been likened to an “obsession” (Bannister, 2005). However, the research identifies this production mentality as a direct consequence of the developmental history of wine tourism and the evidently limited entrepreneurial experience in local wine tourism and marketing of the majority of wine tourism stakeholders - thereby highlighting the importance of understanding wine tourism as a concept, business and industry.

As the emergent root of the evident lack of wine tourism business experience and understanding that this production mentality embodies; the influence of developmental history of South African wine tourism is again emphasized. As evident from the conducted research, wine tourism was established through the determination of a few driven individuals; however the conditioned mindset of state protection evidently continued to plague the majority of subsequent wine tourism stakeholders - indicative of a greater misconception of wine tourism as an industry and more emphatically, of its developmental and entrepreneurial potential.

Indeed, entrepreneurial innovation in the South Africa wine sector up until the early 1990’s “dozed happily in isolation” in a state of “subsidized slumber” (Preston-Whyte, 2000: 104) with the fledgling wine tourism industry subsequently enjoying

little industrial support and fragmented primary stakeholder buy-in and commitment. This limited initial understanding of the concept, industry and business of “wine tourism” has continued to manifest through the diversity of conflicting perspectives and actions in South Africa identified in the literature and research in more recent years. Specifically, the current prevailing lack of a unified clarity of understanding and directive vision for wine tourism is revealed to underlie the greater industrial fragmentation prevalent in South Africa, especially in the identified key developmental stumbling blocks of funding, research and state support and moreover, the haphazard application of basic tourism principals such competitiveness, collaboration and communication - culminating in an identified “*weakness of associative networks and industry structure and authority*”.

4.5.20 Degree of understanding of wine tourism: Attitude and expectancy

The importance of understanding “wine tourism” as a concept, business and industry is most emphatically highlighted in the research when considering the direct link revealed between the level of stakeholders conceptualisation of wine tourism and their apparent “attitude” toward it. This is captured in the research finding that many South African wine tourism stakeholders are evidently beset with a sense of pervading apathy: “*an attitude of waiting; waiting for ‘someone else’ to make decisions and take developmental initiatives*”. This apparent vacancy of leadership in industrial development of wine tourism is compounded by the identifiable presence of a culture of resistance, which moreover emerges to paradoxically coexist with a recognisable attitude of entitlement.

This stakeholder “resistance” stems from the lack of clarity and understanding of the role, function, potential and expectation of South African wine tourism, specifically encompassing a noted aversion to the developmental and marketing paradigm shifts that engaging in wine tourism implies and requires for these stakeholder’s current business practices. Equally though, stakeholders are also subject to a sense of entitlement, where wine tourism developmental initiatives and actions perceived to exist to serve only their individual needs rather than the greater industry and are generally “*expected to be funded externally*”, without the stakeholders further financial contribution or commitment.

Such identified “attitudes” were revealed to be further complicated by wine tourism stakeholder’s evident conceptual differences with regard to the identified issues of regional competition, persistent international stigmas for local wines and the ever-present “snob” and “elitist” image of wine in general. However, the ultimate significance of stakeholder attitude toward wine tourism emerged from the research discovery that this attitude overwhelmingly determines the stakeholder’s individual conviction in wine tourism as a whole. As such, without a clear understanding of wine tourism’s definition, extent, potential and requirements, wine tourism stakeholders are revealed to be understandably adverse to committing time, funding and energy to such an “*unknown, unproven and uncertain enterprise*”.

The ramifications of such a haphazard understanding of wine tourism as evident in the research is especially significant to current and future developmental strategies and initiatives for the South African industry, particularly considering that local wine tourism is evidently coordinated on a national level essentially through the voluntary services of non-mandated individuals, as exemplified in the national efforts of the SAWRF. Moreover, these organisations and individuals, such as the wine routes, that are indeed attempting to harness and utilise what levels of understanding and experience of wine tourism do exist, are continually faced with the emergent and tempering reality that all wine tourism activities and developmental initiatives are essentially governed and limited by the evident primary financial and capacity resource of the industry - the wine farmers and producers. Again emphatically highlighting the critical and core importance and determinant role of their level of cognition and degree of understanding of wine tourism, and the associated attitude and commitment, for all current and future wine tourism developmental initiatives in South Africa.

4.6 Emergent theory for South African wine tourism development

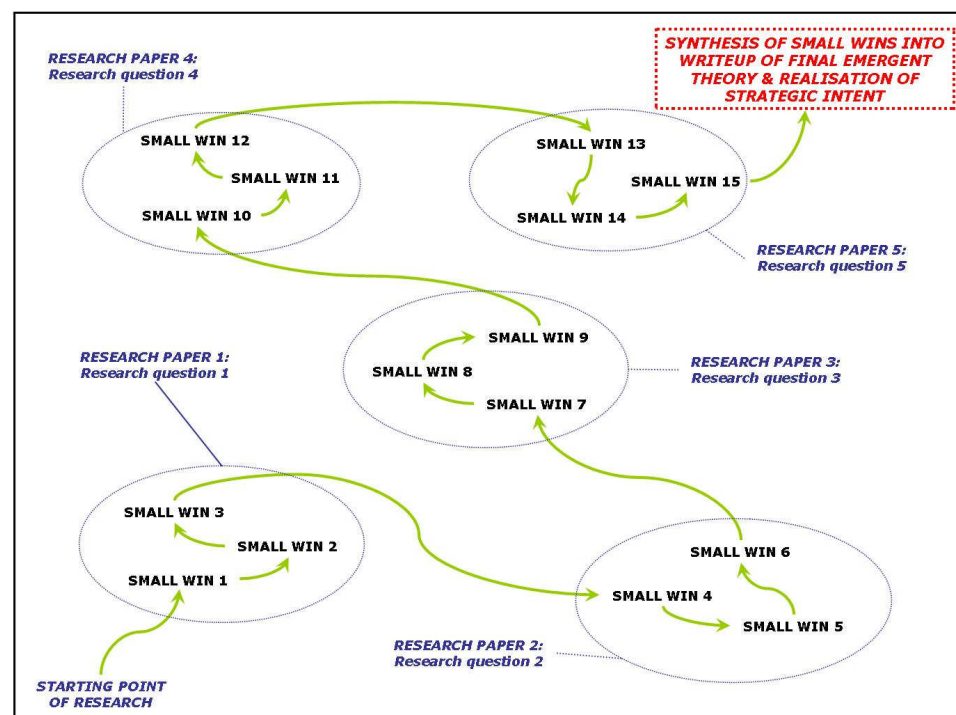
Having presented the extent of the research results gathered in the continuing grounded theory process that offers answers to the five evolved and refined research questions of this study, this following section summarises the key emergent findings into a concluding central narrative that explains the revealed core variable and the

greater developed theory that offers an answer research's primary over-arching research question of why is the South African wine tourism industry not realizing its broadly perceived potential? – thereby further postulating a data-grounded plausible explanation for the identified practical problem and research concern of the frustratingly slow and dissatisfactory disparate development of the South African wine tourism industry.

This summation of the study's central thesis of concern, question and answer describes and explains the revealed core variable of this wine tourism developmental research and concludes with a sequential portrayal (illustrated in a causal loop diagram) and thorough account of this study's complete emergent theory for South African wine tourism development.

This section summarily represents the synthesis of all five research papers results and findings. See the area outlined in red in Figure 4.10 below.

Figure 4.10: Orientation of all the research question's results and findings within research framework and narrative process.



4.6.1 The Core Variable: the degree of understanding wine tourism

As evident in the previous sections and throughout the research gathering and analysis process, the identified “variable” that recurs most frequently is that of *the degree of understanding of wine tourism*. This degree of understanding of wine tourism is essentially a collective variable that describes the identified wine tourism stakeholder’s cognitive grasp and comprehension of wine tourism as a compound industry, a diverse practical agri-business model and a historically, politically and organisationally complex concept in the South African context.

The proliferation and significance of the degree of understanding of wine tourism is emphasized in the pervading research evidence of the majority of South African wine tourism stakeholders, including state representatives, respective wine and tourism sector organisations and wine farmers and producers, being insufficiently aware or admittedly remaining unconvinced of the actual South African contextualised nature and extent of “wine tourism”. This haphazard and disparate understanding is practically exemplified throughout the research results in the manifestation of diverse irregularity, confliction, fragmentation and in the evident inconsistency of identified structures, practices, knowledge and experience.

From the research, it is clear that there is a historically rooted, but prevalent and considerable “element of dissonance” in the greater relationship between the South African “wine” and “tourism” sectors (Van Zyl, 2005: 5). On the one hand, there is an entrenched “production” orientation held by wine farmers and producers, and on the other hand tourism enterprises are contrastingly confirmed as “service-based” (Loubser, 2004). Contemporary literature further supports this industrial differentiation of orientation with “wine production” and “tourism” considered to fundamentally represent opposite ends of an industrial spectrum, with each activity characteristically different. On a fundamental and conceptual level, the understanding of how these two industries of wine and tourism diverge, and indeed converge, across the range of economic, technical, cultural, geographic and vocational factors is critical to sustainable wine tourism development (Carlsen, 2004).

However, from the identified fragmentation and practices of non-collaboration revealed in the historical research and the evident authoritative hierarchical vagueness and organisational confusion regarding stakeholder perceptions of involvement, interest and responsibility; the associative collective understanding of South African wine tourism as a compound industry of both wine and tourism sectors is effectively diluted and subsequently insufficient.

This evident industrial and organisational misconception is compounded by the further identified disparate understanding of wine tourism as a “product and market” in South Africa. From the research, the wine farmer and producer emerged as a key stakeholder in their role as the industry’s primary developmental resource and determinant in terms of funding, wine route facilitative control, and most significantly in their ultimate ownership of, and subsequent dictation of the look and feel of wine farm destinations. Crucially, the significance of this wine farmer and producer’s control and the impact they have on essentially determining and shaping the nature and extent of marketable tourism product for South African wine tourism is evidently inconsistently and often, simplistically understood. However, it is also apparent in the research that within this developmental context, the scope of wine tourism as a wine farm business model that is applied by wine farmers and producers is insufficiently comprehended.

Indeed, the research highlighted that the spectrum of wine tourism destination activities and potential is not clearly defined or understood by the majority of stakeholders in South Africa, with many wine farmers and producers evidently delimiting their cognition and commitment to engaging in wine tourism to “just wine route membership” and “cellar-door tastings”, specifically without discernable cognizance of the further fundamental tourism and service elements such as the identified regularity of opening times and the prioritisation of visitors needs and expectations. This is again indicative of the dominant wine production mentality and prevailing mindset of “*secondary consideration for the scope of tourism enterprise in South African wine regions*”.

Such a prevalently narrow perception of wine tourism not only inherently stifles entrepreneurship and tourism creativity and ignores the diversity of farm resource

commercialisation and commodification opportunities, but it also evidently emphasises a dismissive stakeholder attitude toward understanding the nature, extent and importance of the wine tourism destination product. From the research it is clear that without a willing attitude and the associated level of commitment and mindset such an attitude implies, wine farmers and producers will never be comfortable with the capital, time and human resource prerequisites and business paradigm adjustments that wine tourism engagement and involvement evidently requires. And with the wine farm destination emerging as the central attraction and defining tourism product of the South African wine tourism industry, a lack of understanding hereof and the subsequent lack of commitment, will evidently continue to combine and undermine the totality of the potential wine tourism experience in South Africa. This is emphasised not only in terms of individual wine farm and route sustainability, but moreover in the perceived developmental “ceiling” and capacity limitation that it effectively places on the South African industry.

Therefore, without a broad-based understanding of wine tourism, from a tourism product and service perspective, and also on a conceptual and industrial level, wine farmers and producers will not grasp the gravity and extent of their primary resource supply and development roles and moreover, will remain oblivious of their ultimate effect on, and responsibility for industry expectation, cooperation and capacity.

The inconsistent and disparate understanding of wine tourism has also been identified in terms of the greater developmental management and responsibility of the South African industry. Significantly, it has emerged to be at the root of the identified authoritative confusion and fragmentation of cooperative initiative and action that affects the full spectrum of identified wine tourism stakeholders. Indicatively a lack of clarity and cognition of the nature and extent of wine tourism is evident at all levels of this stakeholder spectrum, from government departments through to the wine farmers and producers, with each stakeholder group and individual perpetuating a different understanding, agenda, approach and priority to wine tourism. Thereby further compounding the identified overarching culture and practices of “non-collaboration”, and also stifling the collective efficacy of individual stakeholder’s developmental efforts.

As a result of this emergent central frequency of the degree of understanding of wine tourism evident in the historical, structural, systemic and limitation research results, and with its relational linkages and intrinsic explanation of the majority of identified variations and behaviours in South African wine tourism development, the characteristics of a core variable are exemplified, This discernable central explanatory role and its causal mechanism implications of the degree of understanding of wine tourism as the core variable of this study are identified and discussed in the next section where the completed grounded theory for South African wine tourism development is postulated.

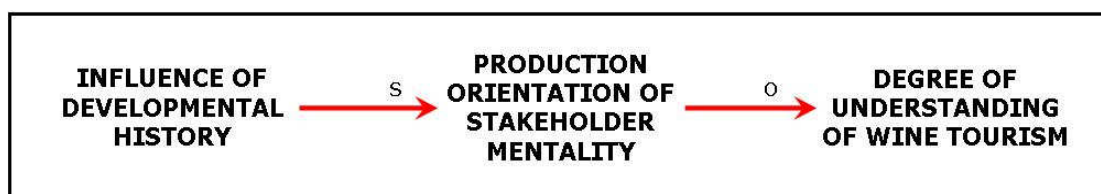
4.6.2 Summary of the emergent wine tourism development theory: a Causal Loop Diagram

The emergent extent and relational importance and impact of the degree of understanding of wine tourism can be represented as part of a Causal Loop Diagram (CLD), which graphically represents the systemic structure of the developed emergent research findings. The following progression of Figure 4.11 CLD diagrams track the development of the emergent grounded theory of this study, depicting the key drivers and variables that the research has revealed to behaviourally interact to determine wine tourism development in South Africa. Each diagram builds the CLD by explaining the causal relationship for each subsequent variable.

These argued relationships are graphically depicted by a linking arrow between the variables, with the nature of this relationship conveyed by the corresponding direction of the arrow and the inclusion of either the letter “O” or “S”. “S” indicates that a change in the initial variable equates to a change in the next variable in the same direction (S = same), such as for example, an increase in one would correspond to an increase in the other. The “O” conversely indicates a relationship where a change in the initial variable equates to a change in the next variable in the opposite direction (O = opposite), such as for example, an increase in one would corresponds to a decrease in the other. In critical realism terms, this CLD graphically illustrates the emergent processes, structures, powers and causal mechanisms that the research results suggest are beneath the empirically observed events and experiences.

The construction of the final CLD can be concisely understood in terms of the emergent nature and process of the research findings. Commencing with the first research question, the literature and gathered and analyzed research data evidently revealed the powerful continuing *influence of the developmental history* of protective wine industry practices on the entrepreneurial initiative and the integration of wine and tourism sector activities. The identified historical resistance embodied by state departments and the evident restrictive legislation of the time was uncovered to further discourage market and tourism pursuits on wine farms in terms of the greater receptiveness of stakeholders to wine tourism. This was most emphatically revealed in the identified evidence of a pervasive wine *production orientation* of decisions and actions of identified wine tourism stakeholders; with primary elements of tourism such as competitiveness and cooperation emerging to be severely misunderstood and summarily lacking. As such, the research revealed that the concept, business and industry of wine tourism were fundamentally unclear in terms of stakeholder's *degree of understanding* of the principals, paradigms and practices that wine tourism requires. These causal relationships and linkages are graphically indicated in Figure 4.11.1.

Figure 4.11.1: Diagrammatic representation of the emergent causal relationships and arguments in South African wine tourism development, 2010.

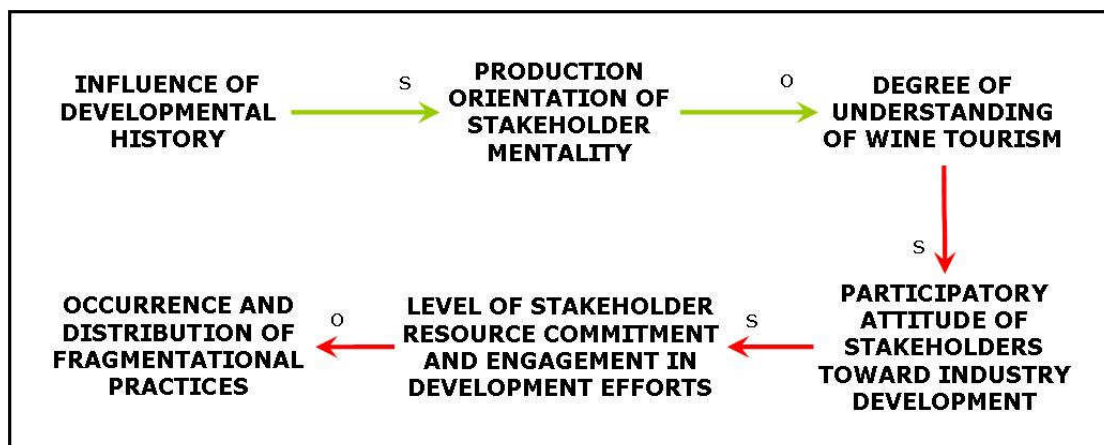


Compounded by the extended heritage of state protection, an prevailing wine production focus of initiative and priority, and a lack of general tourism experience; the revealed lack of defined clarity and uniform understanding of wine tourism was clearly established in the research to significantly determine the nature of stakeholder *attitude* and subsequent *commitment* to wine tourism. More specifically, the variances in stakeholder expectation and appreciation of wine tourism's potential emerged from the research to primarily shape their attitude toward, and willingness to commit resources and engage in wine tourism activities and relevant developmental

initiatives. And as a result of the evidently conflicting and inconsistent understanding of wine tourism as an industry, business practice and concept; the continuing literature sampling and emergent research findings argue that the development of wine tourism in South Africa was subsequently characterized by regional, organizational and sectoral *fragmentation*.

These relationships and the ongoing casual arguments and links are graphically indicated in Figure 4.11.2, where a lowered understanding of wine tourism results in a lowered level of stakeholder commitment and diluted attitude, subsequently aggravating (increasing) the fragmentational practices.

Figure 4.11.2: Diagrammatic representation of the emergent causal relationships and arguments in South African wine tourism development, 2010.

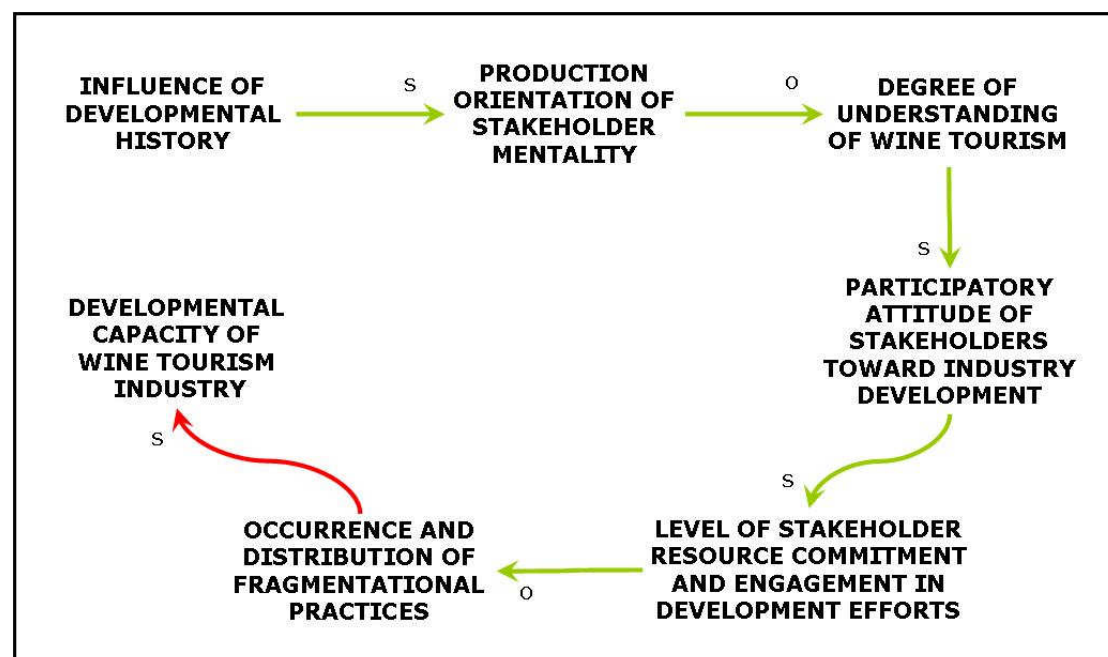


From the ongoing research, these fragmentational practices are revealed not only within the identified absence of a central coordinated industrial authority, the evidently vague developmental policy and in the token (and subsequently intangible) governmental support, but moreover in the emergent lack of collaboration, communication and synchronized developmental efforts of wine tourism stakeholders that these fragmented conditions aggravate. Compounded by the uncooperative and protective mentality and attitude of wine tourism's revealed primary financial and developmental resource, identified as the wine farmers and producers – the fragmentation is further identified in the research to pervade the greater industry,

thereby severely inhibiting the actual *developmental capacity of wine tourism* in South Africa.

From the research into the structures and practices involved with wine tourism development in South Africa, it is clear that the potential development and growth of wine tourism is restrained and limited by the evidently confused nature and fragile extent of management and industrial systems. A situation that is argued to stem from the primary developmental stakeholders persistently dominant production orientated paradigm and misconception of the tourism industry and subsequent misunderstanding of “wine tourism”. These continuing casual relationships and linkages are graphically illustrated in Figure 4.11.3.

Figure 4.11.3: Diagrammatic representation of the emergent causal relationships and arguments in South African wine tourism development, 2010.

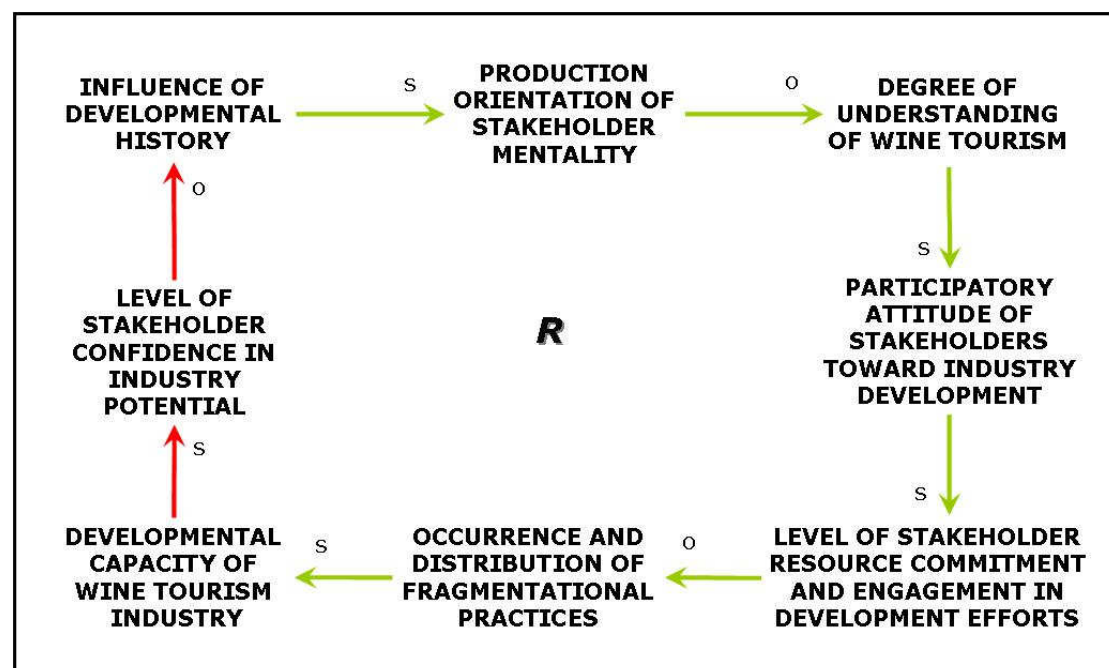


As identified in the initial research and stakeholder consultation, there is an evidently discernable popular perception of the greater broad-based potential of South African wine tourism, for both the wine and tourism sectors and for the regions, communities and stakeholders involved. However, the continuing research revealed that this general confidence is evidently weakened by the fragmented, haphazard

developmental experience and continuing industrial struggle in terms of building developmental capacity. This perpetuates a stagnation of stakeholder confidence, not only in wine tourism's developmental capability and capacity, but also in the potential prospects and growth of the industry. The extended relational causation of the fragmentation, ingrained mind-sets and conceptualisations, political and organisational confusion, and lack of collaboration summarily result in the proliferation of a perceived burden and identified developmental apathy amongst stakeholders.

This collective causal process thereby aggravates a cognitive withdrawal of belief and *confidence in wine tourism* developmental efforts, initiatives and proposals, ultimately reinforcing and exacerbating the historically limiting approaches and practices of the prevalent production mind-set of stakeholders; subsequently also further clouding the greater understanding of wine tourism and weakening the vital stakeholder attitude and commitment to the industry and its development. This effectively completes a reinforcing feedback loop of variables and relational links that illustrate and describe part of the postulated emergent theory of South African wine tourism development, indicated by an “R” in Figure 4.11.4.

Figure 4.11.4: Emergent reinforcing loop of causal relationships that contribute to the slow and disparate development of South African wine tourism, 2010.



However, this is only part of the knowledge (research answer) provided by this study to help address the primary research concern of slow and disparate wine tourism development. The causal mechanism in Figure 4.11.4 would effectively cripple and collapse the wine tourism industry in South Africa into non-existence if left as is; and (in critical realism terms), the “reality” of wine tourism development that has been observed in this study is clearly more complicated and intricately involved.

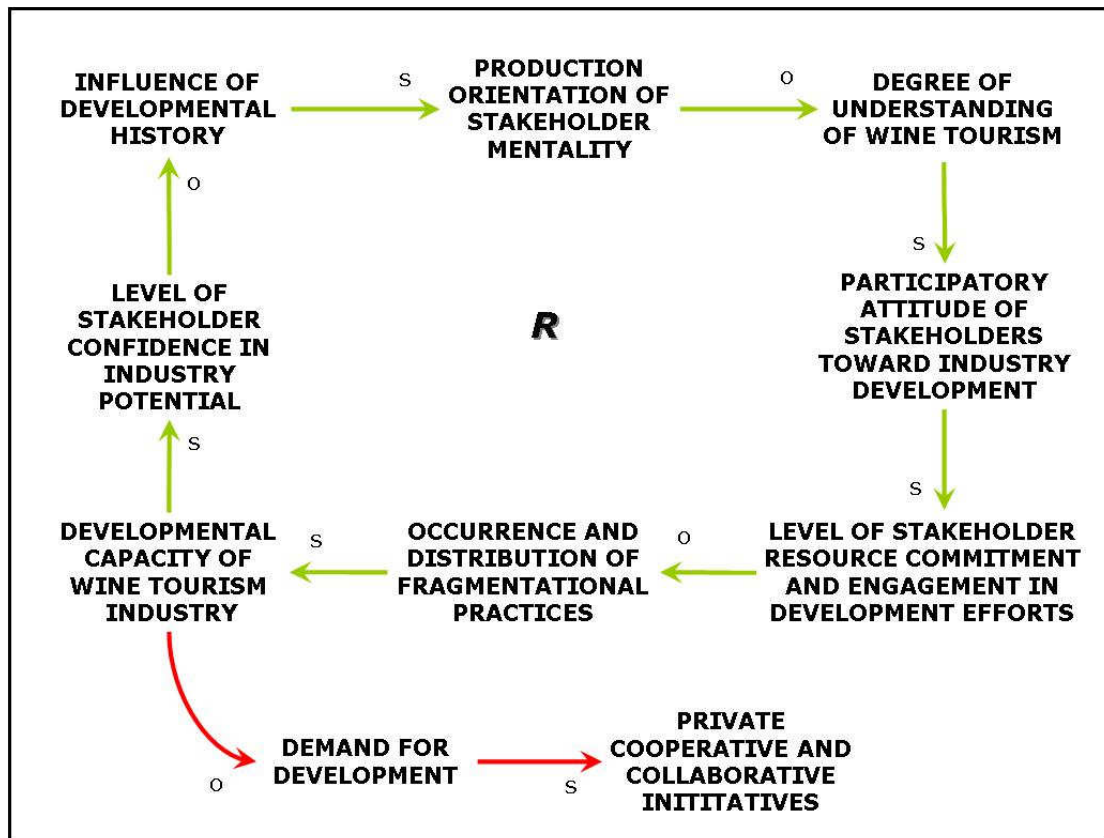
As such, the reinforcing relational engine of slow and haphazard development as illustrated in Figure 4.11.4 is evidently balanced by a stabilizing causal loop of further relationships, which are revealed in the research to represent the identified driving processes that contribute to the positive level of recognised growth and repute that is also associated to South African wine tourism.

This balancing loop is inherently driven by a cognitive gap between stakeholder’s perceived potential for wine tourism and the actual experienced realization thereof. As such, the balancing loop is triggered by stakeholder’s subsequent dissatisfaction at the hamstrung (lowered) developmental capacity of the industry, thereby increasing their *demand for such development*. And as revealed in the research, it is individuals such as figurehead wine farmers and producers and organizations such wine routes that have emerged to voluntarily coordinate this demand for greater development - thereby furthermore attempting to realize a greater vision of South African wine tourism’s broad-based potential.

From this apparent developmental dissatisfaction, *private developmental initiatives* are revealed to manifest themselves, Catalyzed by the forward thinking and determination of evidently dynamic, educated, charismatic, determined, committed, entrepreneurial and market-orientated individuals with a collaborative work ethic, these private initiatives are empowered by the growing realization of the necessity to *communicate and cooperate* in sharing relevant industry experience and market data to strengthen appropriate developmental decision-making and strategies, as exemplified in the research by the independently coordinated sectoral and stakeholder integration communications, efforts and actions of progressive wine farmers, wine route management and the collective wine route forum (SAWRF).

The continuing causal relationships of this balancing loop and its link to the initial reinforcing loop of wine tourism development are graphically illustrated in Figure 4.11.5.

Figure 4.11.5: Diagrammatic representation of the continuing emergent causal relationships and arguments in South African wine tourism development, 2010.

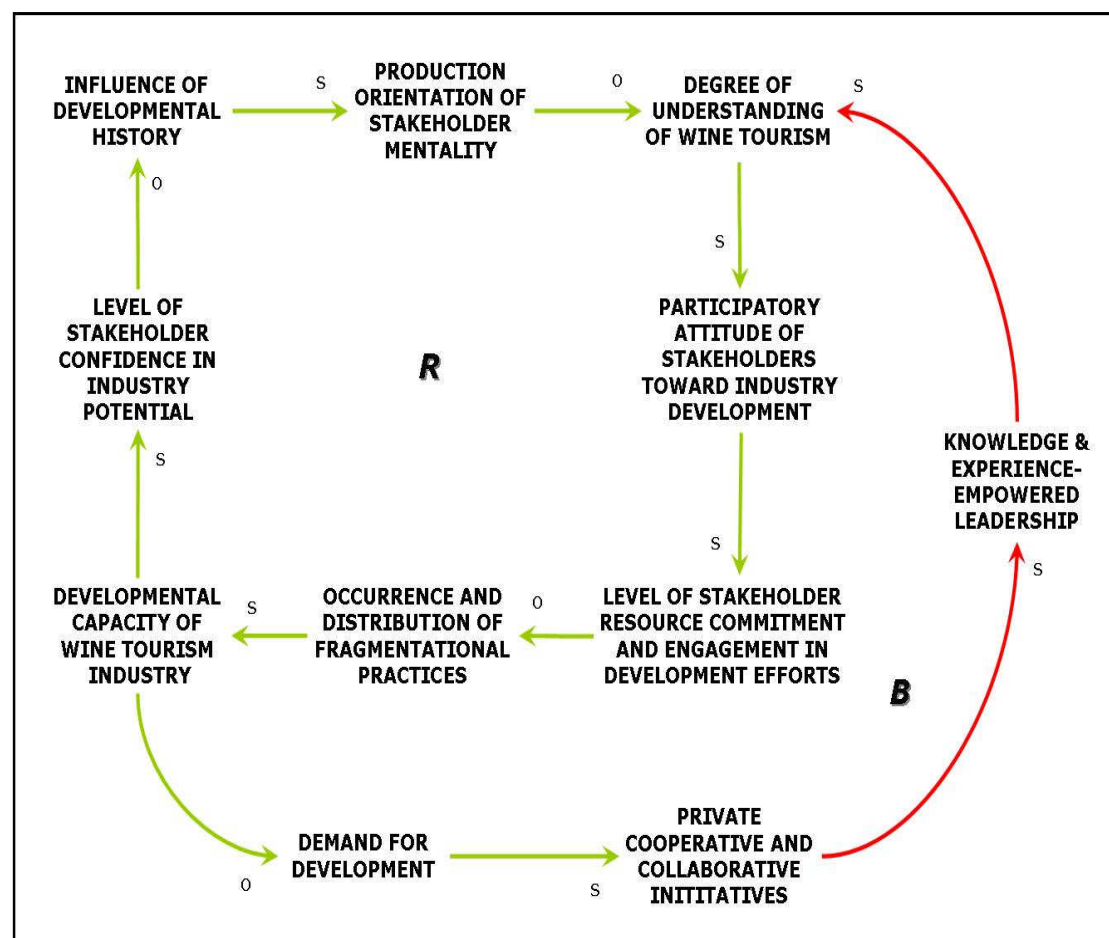


As the research of this study continued, it became further evident that the coordinated knowledge and experience of these collaborative individuals, producers, farms, routes, forums and organizations fundamentally led to the emergence of an empowered guiding leadership, which subsequently diffuses a greater understanding of the nature, extent, possibilities and requirements of wine tourism is into the larger wine tourism developmental system in South Africa.

As such, in the context of the greater fragmented and un-supportive structure of the revealed South African wine tourism developmental system, these progressive

developmental stakeholder's improved *degree of understanding wine tourism* and their corresponding conviction in its potential and further commitment thereto are evidently revealed to be responsible for driving what progressive developments have indeed been accomplished in the industry thus far and identified in the research. These balancing causal relationships and links are depicted in Figure 4.11.6 with the balancing loop indicated by a "B".

Figure 4.11.6: Diagrammatic representation of the completed causal loop (reinforcing and balancing) of emergent causal relationships and arguments in South African wine tourism development, 2010.



With the completion of both the reinforcing (R) and balancing loops (B) in Figure 4.11.6, the balancing nature of the identified causal relationships that link to, and diffuse through the entire causal loop system via the identified core variable of the degree of understanding of wine tourism is graphically summarized. As such, Figure

4.11.6 also essentially represents a graphical findings summary of the research process followed in this study, for within the CLD and the argued linkages and relationships, the compilation of all the data gathering, sampling, analysis and constant comparison of results from each of the five research papers is also represented, More specifically, as an ongoing grounded theory study, each of the successive research paper's emergent findings collectively contributed to the identification and construction of a fuller comprehension of these perceived process, structures, powers and causal mechanisms evident in South African wine tourism development.

Therefore, in postulating this data grounded theory of relational links, with the degree of understanding emerging as the core variable, this chapter summarily describes, explains and argues the historical context (RQ1), the developmental responsibility debate (RQ2), the existent management and operational authorities (RQ3), the practical implementations (RQ4), and the industrial limitations (RQ5) of South African wine tourism - ultimately offering a metasynthesis of all the research results and findings that plausibly answers the overarching research question of why is the South African wine tourism industry not realizing its broadly perceived potential?, and furthermore submits insight and priority toward addressing the primary research concern of the slow and disparate development in South African wine tourism.

4.7 Conclusion

This chapter has presented a narrative of the applied research process that was followed in this study through describing the evolution of the guiding research questions and the research results and findings thereto. Contextually integrated with the available literature and through ongoing data sampling, stakeholder interviews, gathered documentation and observation this chapter has identified, described and analysed the South African wine tourism industry in terms of the historical influences, industrial authority and responsibility complexities, central stakeholder roles and functions and the core developmental restraints and limitations.

In this chapter the prevalent influence and developmental consequences of the historically regulated wine industry and isolated tourism industry were identified. The indistinct nature and extent of wine tourism industrial authority and developmental responsibility structures were revealed and the central significance of wine routes and wine farmers and producers as the primary drivers and resources of South African wine tourism was confirmed. And finally, the widespread emergence of the inconsistent and dissonant understanding of wine tourism, as a concept, business and industry was identified to emerge as the core variable underlying and influencing South Africa's wine tourism developmental situation. In so doing, this chapter has revealed a greater in-depth comprehension of South African wine tourism and provided insightful analysis and argument as to why the industry is not realising its perceived potential and is evidently slow and disparate in terms of development.

The following chapter will summarise the conclusions and recommendations to be drawn from the emergent developmental theory and research findings, outline future studies and evaluate the study as a whole.

"When asked what wines he liked to drink he replied, 'That which belongs to another.'"

Laertius Diogenes (Ecask, 2007).

CHAPTER 5

SAVOURING THE WINE: CONCLUSIONS AND EVALUATION

5.1 Introduction

“The fact of the matter is that South Africa is the one country in the world of wine that really cannot be understood adequately except in the much broader context of its nearly unique social, political and economic condition” (Franz, 2008).

Taking cognizance of the identified developmental restraints and limitations and empowered by this study’s comprehensive designation of the South African context and setting in historical, structural, authoritative, stakeholder and developmental driver terms, the following sub-sections of this chapter synthesise the key conclusions that can be drawn from the research findings into a concise description, consideration and argument of recommendations for the effective and sustainable future development of South African wine tourism.

As such, this chapter comprehensively completes and concludes the central thesis of this study - exploring the wider implications and significance of this study’s research findings (research answer), thereby evaluating how well the over-arching research question of why is the South African wine tourism industry not realizing its broadly perceived potential has been answered, and subsequently further explaining and examining how the findings (research answer) deal with and address the primary research concern of the slow and disparate development of wine tourism in South Africa. The chapter concludes by looking to the future through identifying further research needs and knowledge requirements, specific to the South African wine tourism research field.

As evidenced in the research and literature, this study has established that in the last decade there has been a growing body of wine tourism knowledge, literature and research on the developmental opportunities and the apparent keys to success of wine tourism. However, more recent years have evidently seen the emergent fragmented, dissonant, un-collaborative and non-integrated nature and extent of the wine and

tourism industries combine to undermine the capacity, legitimacy and efficacy of South African wine tourism developmental efforts and coordination initiatives.

From the research, the local industry is therefore revealed to evidently be at the limit of its existing developmental capacity, as determined by the constrictions and restraints of the current structures and systems explored in the previous chapter. The evident status quo in terms of voluntary coordination and unfunded initiatives cannot realistically expand or accelerate the developmental aspirations of wine tourism stakeholders. However, from the research a number of key conclusions and priority recommendations have emerged for effective and tangible developmental progress, with special emphasis on addressing the evidently disparate and haphazard understanding of wine tourism that pervades the local industry. These are described and explained in the following sections.

5.2 Expectations of wine tourism

From the central core variable of this research, one of the primary recommendations to emerge is that a clear definition of the South African wine tourism concept needs to be understood.

5.2.1 Focusing expectations within the current industry context

International research and conceptions evidently do not necessarily capture the nature and extent of the unique South African developmental experience and moreover, the relevant international perspectives on the potential of wine tourism cannot similarly be transposed onto the local industry stakeholders. Primarily, both the government and private sector stakeholders need to know what wine tourism actually constitutes in, and for South Africa. By narrowing a clear expectation of the potential of wine tourism from the comprehension of the capacity (and limitations) of the industry, a greater holistic understanding of what wine tourism can feasibly offer could be achieved. Specifically in terms of the various stakeholder's key criteria: e.g. wine farmers are interested in the return on investment and government is interested in employment creation.

In South Africa, wine tourism is often popularly touted as a potential saviour of the economically challenged wine industry, but the evident reality is that the wine and tourism relationship is not automatically symbiotic in the local context. Wine tourism has emerged as an area of past, present and potentially continued conflict for the primary stakeholders involved, particularly in terms of their motivations, practices and prioritised objectives. As such, wine tourism development cannot be simplified to just a broad imposition of “tourism principals and developments” upon local wine regions and farms with the expectation of immediate results and returns.

It is clear that in local context, the wine and tourism associative networks are fragmented and the levels of industry understanding, research and data is insufficient, and as such, a “build-it-and-they-will-come” attitude is inherently dangerous on the part of wine tourism product owners and naively assumptive on the part of public and industry authorities. However, this apparent oversimplification of tourism market forces and drivers prevalent in the South African industry is indicative of the lack of understanding amongst the majority of wine tourism stakeholders.

5.2.2 Communicating the emergent reality of South African wine tourism

In as much as there is evidence of a misunderstanding of what wine tourism constitutes as an industry and requires at farm level, there is also a clear need to realise and appreciate the limits of wine tourism potential in South Africa, especially in terms of stakeholder expectations.

A truth that many wine tourism organisations, associations and individuals tend to neglect and avoid is that, as in all national industrial development, there will certainly be failures in future wine tourism development efforts, and particularly the high and often grand aspirations and visions of instant stakeholder cooperation, substantial economic success and over-night industry prosperity need to be tempered by cognizance of the South African evidently limited industrial reality. Indeed, questions remain as to whether or not wine and tourism are always suited to each other as industries and complimentary businesses; particularly in the diversity of motivations and interests to engage in wine tourism activities.

However, although a “positive” outlook and ambition is certainly not to be discouraged for wine tourism development; it is critical that informed and contextualised expectations and understanding of the system that South African wine tourism exists in are established if clear, feasible and measurable developmental targets and objectives are to be formulated and endeavoured, not only for individual stakeholders, but also the industry as a whole. And as such, within the research answer (results and findings) of this study that comprehensively contextualises, defines and frames the local industry in both conceptual and industrial terms – a significantly fuller understanding and expectation of South African wine tourism has been presented.

5.3 Research and education

To forward a clearer understanding of wine tourism, the pervading lack of localised research and data also needs to be addressed.

5.3.1 Gathering a clear economic picture: Return on Investment

Wine tourism is evidently not a “free-ride” with considerable time, money, energy, personal and opportunity costs; however the bottom-line of wine tourism is as yet, significantly speculative in South Africa. The insufficient non-industry specific and irregular tourism, visitation and spending data and the identified lack of available cellar-door quantitative research into the operational costs and income of wine tourism-specific activities contribute to an unclear economic value and perceived potential of wine tourism.

5.3.2 Tourism market principals, product and service education

Aside from the absence of consistent and reliable cellar-door research and market data, there is also a stakeholder scarcity of entrepreneurial tourism education and experience to leverage and exploit such information. As evidenced in the research, there is an overwhelming production paradigm and widespread practices of non-collaboration that has a considerably inhibits wine tourism related decision-making and impinges upon the general attitude of the industry. Critical to developing a broader understanding of wine tourism is addressing the orientation of the business

paradigms and models of stakeholders through the greater diffusion of tourism principals. This broadly includes the fundamental market elements of cooperation and competitiveness, which urgently need to be translated into the “production language” of wine farmers and producers in particular. If such key stakeholders could be effectively educated and provided with clear and comprehensible data-supported market information, it would substantially encourage their commitment to a heightened level of wine tourism activity that are comfortable with, and can thereby financially and feasibly sustain as part of the greater integrated tourism offering of the relevant South African wine region.

Such research and education is particularly emphasised for wine farmers and producers, as they emerged to represent the primary stakeholder in the South African wine tourism industry. Summarily, it is clear in the research that within this evident central role, they are still in need of more information, greater consultation, strengthened integration, and ultimately require substantiated conviction in the industry as a whole. Through their identified importance as the wine tourism product owner and their established value as the ultimate financial determinant of developmental capacity in the industry, particularly for wine routes; the future of the industry’s development ultimately hinges then upon the attitude, confidence and willingness of wine farmers and producers to actively engage with other role-players and tourism partners.

Paradoxically, wine farmers and producers are evidently both the primary drivers and capacitors of the current industry successes but simultaneously also lie at the root of the restrictive fragmentational practices and manifestations. Unless the prevalent historically induced paradigm of mistrust, production-orientation and non-collaboration can be affected amongst wine farmers and producers through informative and embracing education and research, all future wine tourism development and cooperative initiatives, not matter how well-intended, will not be able to achieve viable or sustainable levels of success in the current industry.

5.4 Wine tourism developmental leadership

Although research and education is identified as a priority for wine tourism development in South Africa, it is also clear from the research in this study that data and knowledge in itself is only empowered when actually implemented and utilised. The question then remains as to who or what is responsible for implementing such informed developmental initiatives and educational efforts.

5.4.1 Leadership and responsibility complexity: wine farmers and producers and the government

In contrast to other New World wine countries such as Australia, Spain and the United States, South African wine tourism is characterised and shaped by historical market protection, political infighting, organisational dysfunction, stakeholder mistrust with little co-ordinated strategic development planning or centrally empowered and stakeholder recognised and accountable leadership. From the research though, two key sector representatives have centrally emerged from the spectrum of wine and tourism sector stakeholders to exemplify the evident complexity of wine tourism developmental leadership: wine farmers and producers and the relevant government department for tourism.

Amid the concerns underpinning wine tourism leadership, these two stakeholders arise as the arguable determinants of the immediate future of wine tourism development in South Africa. Surrounded by the limitations and hindrances of fragmentation and disparate perspectives and attitudes, the leadership issue of the wine farmers and producers and the government emerged as an evident lack of clarity regarding the recognition of their own inherent “leadership” roles, specifically regarding the degree of self-awareness of their primary importance and responsibility as revealed in the research.

In the study, wine farmers and producers were revealed as the core finance and capacity resource of South African wine tourism, but despite this they evidently remain primarily unaware of the inherent developmental influence and responsibility that these roles of wine tourism product owner and developmental capacity determinant imply. And although the Western Cape government has expressed a

desire to “take the initiative” in terms of wine tourism development, it also admits to an evident lack of wine tourism-specific knowledge, policy and man-power. As such, the question of “leadership” in terms of wine tourism industry development evidently remains a complex and contentious issue.

5.4.2 Future development leadership: Integrated industry coordination

However, even in an environment characterised by the emergent absence of currently tangible governmental facilitation and support, and furthermore by the evidently fragmented and protective practices and mentalities of wine farmers and producers; there remains a pervading and unanimously shared need in South African wine tourism for a capacitated coordinating organisation or individual to establish an *industry stakeholder recognised* central leadership. The primary call for this leadership emanates from the evident need to effectively consolidate the current systems, narrow the divide in conceptual understanding and operational practice between many industry stakeholders and manage the history of complacency, distrust and non-collaboration between the tourism and wine sectors.

Such a centralised organisation could circumvent a great proportion of the limitations identified in the research by:

- collectively understanding the contextualised South African wine tourism industry as a whole,
- consolidating the current management systems, and
- optimising the existing associative networks.

More specifically, by setting out a clear initial blueprint of objectives and goals developed from a measured and extensive consultation with identified key stakeholders, such a proposed coordination organisation could contractually embrace the mandate to develop South African wine tourism holistically, and furthermore be held accountable to it, thereby incentivising performance and encouraging delivery of these objectives and goals. Through initiating such an central, wine tourism-specific and sectorally impartial organisation with the input and recognition of the identified wine tourism stakeholders, the problems of mistrust and stakeholder buy-in and commitment could feasibly be mitigated; and with a transparent structure of agreed

duties and functional and operational tasks, rather than the recycling of expansive tourism wish-lists, the inefficiencies of past developmental strategic vagueness could be minimised, leading to greater executable action and substantial results, therein reinforcing an improved stakeholder attitude and commitment.

5.5 Going forward: Industry development steps

However, although there is clear evidence that wine tourism in South Africa can, and does indeed exist with little or no central holistic coordination or planning, it is also clear from the relevant literature that some form of consolidated development management strategy is important to stimulate long term and sustainable growth. As established in this study, there is a palpable belief in the potential of wine tourism and a developmental desire in the South African industry, but significantly, there is currently no capacitated or funded industry facility with the singular and full time task of coordinating and leveraging this shared stakeholder will. The expressed and prevalent issues of fragmentation funding, capacity and confusion and disagreement over stakeholder responsibility and representation evidently remain unresolved.

5.5.1 Recognising and understanding the unique South African context

One of the greatest challenges for wine tourism development in South Africa thereby specifically remains as mediating the expectations, needs, understanding and commitment of wine tourism stakeholders. As a common theme in literature on the sustainable management of tourism, the importance of involving of all key role-players in the product development process is vital in order for greater tourism development to succeed (Getz, 2000; Hall & Mitchell, 2002; Tassiopoulos & Haydam, 2004). As such, initial and continuing stakeholder consultation is the critical first step to the realisation of a central coordination organisation that can attempt to collectively defragment wine tourism through facilitating the integration of the evident divide of vague function and uncertain responsibility that exists between the key developmental stakeholders.

However, understanding that achieving such integration and engagement represents the overarching priority for all wine tourism partners in South Africa it imperative, as

the enforcement of a top-down strategic developmental approach is evidently not suited to an industry that has evidently developed “organically” and is driven and funded from farm and producer-level upward (Anson, 2007). This is especially relevant in the context of the pervading protective practices, mistrust and culture of non-collaboration identified in the industry. Therefore, unless this greater understanding and integration of wine tourism can be achieved, the potential of wine tourism that stakeholders generally agree on, will simply not be realised.

5.5.2 SAWRF: Consolidating the current systems and existent leadership

The most recent evidence of such actively emergent leadership, integration and coordination in South African wine tourism was identified in research with the wine routes collectively “volunteering” their forum (South African Wine Routes Forum) in 2009 in a response to the consistently perceived call for coordinated industry leadership. Yet, as identified, the prevalent broader industry constrictions of limited funding and support, regional delimitation, political agendas, conceptual and industrial mis-understandings and apathetic stakeholder attitudes remain impedances to their capacity and efficacy. However, as evident in the research, wine routes represent the primary setting of wine and tourism sectoral interaction, and the extent of active developmental management in South African wine tourism. As such, although limited in actionable capacity, the SAWRF with its wine route membership and committee thereby represents an already established wine tourism development platform that is empowered by vested, experienced and willing wine tourism-specific managers, voluntarily coordinating their constituency’s activities in a forum that significantly, is not encumbered by bureaucratic imposition or fragmentation.

Through its dualistic composition of *individuals*, representing the majority of local wine tourism-specific experience and *wine routes*, representing the inherent relationship with member wine farmers and producers (and a concise reflection of the revealed simplicity of actual and tangible stakeholder involvement in wine tourism developmental and management terms); the SAWRF then forms at the very least, an existent initial foundation on which to consider building toward the realisation of a central coordination and developmental organisation.

Significantly, such a proposed coordinating body would fundamentally be intended to assuage the fragmentation of agenda, action and intent prevalent in South Africa. However, it is clear from the identified complexity of hierarchy and evident confusion of stakeholder involvement and responsibility that the last thing the South African wine tourism needs is yet another organisation of “talking-heads” to use up financial resources and add to the already bewildering array of loosely associated agencies and companies claiming and assuming wine tourism authority.

Summarily though, it must be understood that the process to unified coordination is not an overnight occurrence and will realistically take a considerable amount of time:

- Firstly, to eliminate the ambiguity of actual stakeholder involvement in South African wine tourism and debunk the imposed and assumed bureaucracy that complicates the industry’s actual operation and development.
- Secondly, to allow for the vital stakeholder input and subsequent representivity and gradual trust and commitment of key identified stakeholders in the new coordinated structures.
- And lastly, and arguably most significantly, such a process will take time because the most suitable agency to facilitate all these tasks is the very one that does not exist in South Africa.

5.5.3 Industry development requires recognition of responsibility

Taking cognizance of all this, the most feasibly strategic next step suggested and supported in the research is to capitalise on the coordination, consultation and representation of the key stakeholders of wine farmers, producers and routes that is already embodied and established in the SAWRF. In terms of the identified leadership and state support issues then, the onus now lies with the Western Cape Department of Economic Development and Tourism to practically employ its commitment to “*take initiative in wine tourism development*” by forging greater communication and integration with the developmental platform and input already volunteered by the SAWRF, thereby tangibly attempting to realise a capacitated and industry recognised coordination authority, that blends both wine and tourism sector representation and capitalisation.

However, it is not simply a case of government funds for all and everything wine tourism related. It emphatically remains for all of the identified individuals within the wine tourism industry to therefore realize, understand and sustainably take ownership of their developmental responsibilities, thereby recognising their own “leadership” positions and self-capacitating themselves, and thereby also the industry stakeholders they represent, to strategically align the developmental expectations of South African wine tourism.

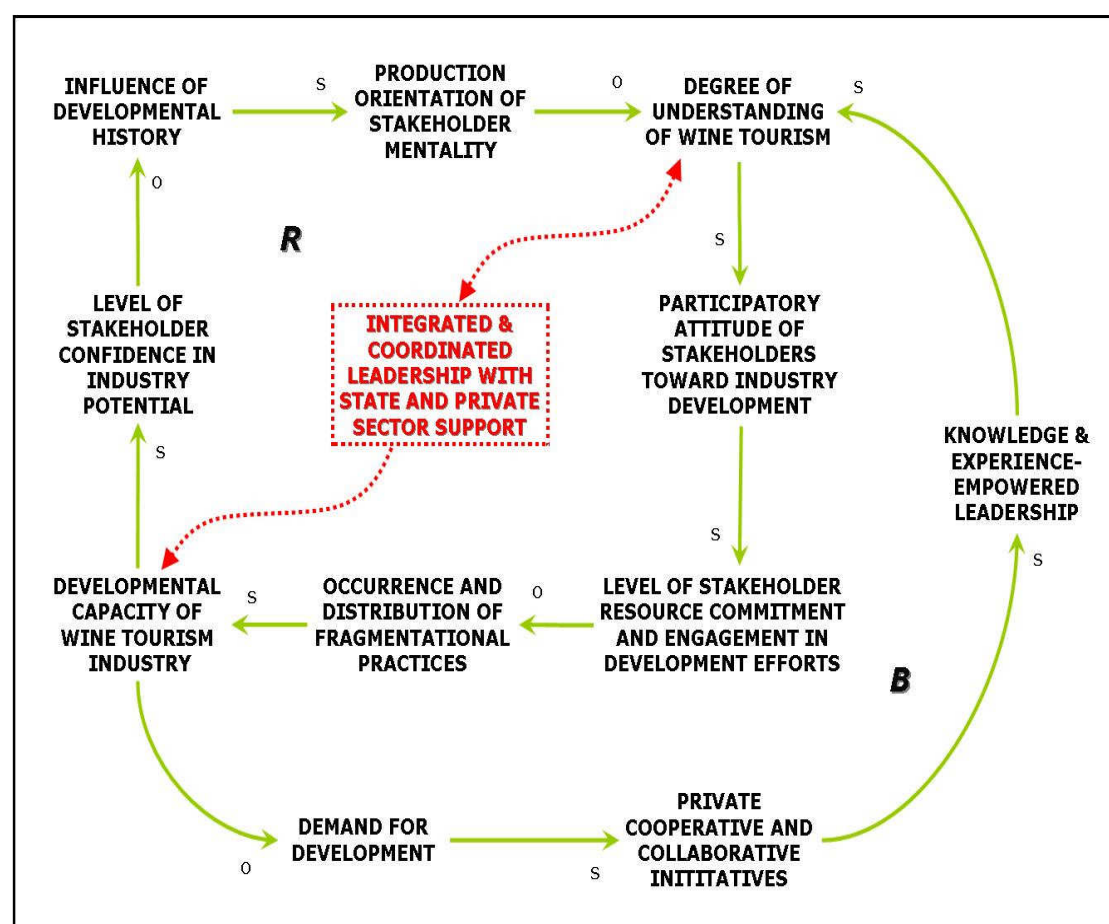
5.5.4 The emergent behavioural intervention for South African wine tourism development (CLD)

The research and literature has revealed multiple practical requirements, guidelines and suggested actions and priorities in terms of how to accomplish this strategic alignment to realise the recognised potential of South African wine tourism. However, before any of these recommended developmental and marketing activities and suggested actions can be applied locally in the South African context - indeed even before a developmental strategy that identifies stakeholder priorities can be executed - the fundamental understanding and coordination of South African wine tourism has to be improved. For without addressing the core fragmentation of understanding and cooperation of local wine tourism, all other developmental actions are inherently premature and moreover, all subsequent longer term actions cannot be sustainably implemented.

The research has revealed that the wine routes in South Africa are empowered by their representation of primary wine and tourism sector interaction and their inherent management relationship with wine farmers and producers. Therefore, by encompassing and channelling the greater understanding and experience of local wine tourism that already exists in wine routes, such a proposed coordination association could draw and build upon the established cooperation, communication, talent and representation of the SAWRF. Moreover, through further facilitation in the form of government capacitation (such as funding, market support and industry-specific data), the evident capacity and regional limitations of routes and individuals (such as funding and staff) could feasibly thereby be circumvented or mitigated.

Figure 5.1 graphically summarises this causal behavioural intervention within the causal loop diagram for the emergent theory on South African wine tourism industry development. The red arrows indicates how the increased collective understanding of wine tourism through channelling the expertise, abilities, facilities and experience of key South African stakeholders (wine routes, private sector and government) within a leadership structure, thereby proposes to further empower and facilitate the developmental capacity and potential of the industry as a whole. Moreover, Figure 5.1 also indicates how such integrated leadership dualistically reinforces the further distribution, networking and communication of a greater understanding of wine tourism within the industry.

Figure 5.1: Suggested intervention in the South African wine tourism development causal loop diagram, 2010.



Such a holistic industry coordination body (as graphically suggested in Figure 5.1) could significantly engage, prioritise, and more importantly, *action* the specific developmental needs of the South African wine tourism industry as a whole. Summarily then, this developmental vision of a central, transparent, representative and accountable wine tourism body will specifically:

- identify, develop and harness the existing knowledge, understanding and leadership of South African wine tourism,
- optimise and capacitate the existing organisational structures and initiatives in the greater localised wine tourism system,
- mobilise the latent and unrealised assets, talent and capacity of the South African wine tourism industry.

In actualising this centrally coordinated platform, a tangible commitment on the part of the core industry stakeholders is undertaken – from both the wine and tourism sectors and from both the private and public sectors. This therein represents a tremendous step toward realising the industry-recognised leadership that South African wine tourism evidently requires to overcome the prevailing factional barriers and limitations.

But more significantly, it also provides the vital cooperative and industry-focussed foundation, which stakeholders, international experience and existent literature all evidently recognise and concur upon, as essential to culturing a mature understanding of wine tourism and maximising its potential and opportunities for participants, visitors, economies, communities and continued future development and success.

5.6 Future Studies

The priority recommendations for futures studies centrally revolve around the identified restraints and stumbling blocks to wine tourism development, with particular reference to encouraging a greater general understanding of wine tourism in the South African setting.

5.6.1 South African-specific wine tourism educational toolkit

As the emergent primary resource and stakeholder of South African wine tourism, wine farmers and producers represent a starting point for developmental strategies of the future. Foremost on the agenda, is the education of wine farmers and producers, specifically by improving the broader understanding of wine tourism, in concept, as a business model and in the requirements of commitment and engagement in wine tourism. The research to realise this would require further in-depth quantitative assessment of the developmental options, marketing systems, costs and funding, opportunities (jobs, education, and diversification) and of course, tourism service requirements and business practices relevant and specific to the South African wine tourism context.

5.6.2 Nature and extent of wine tourism: Industry wide benchmark survey

From stakeholder responses in this study, wine tourism research is generally viewed as a peripheral and expensive exercise. Combined with the practical (e.g. materials and travel) and analytical (e.g. research consultant) costs of research are the climatic, infrastructural and regional disparities experienced in the South African wine producing areas that combine to limit the comparability and usefulness of data collected in specific areas for the industry as a whole. An industry wide benchmarking survey is subsequently also recommended to gather an accurate and up-to-date impression of the nature and extent of each of the various wine tourism regions in South Africa. The Deloitte and Price Waterhouse Coopers wine competitiveness benchmarking studies are viable examples of completed surveys that wine tourism research could use as a framework, or indeed could be included within for the future. However, the pertinent issue of securing wine farmer and producer's agreed and regular participation needs to be addressed and perhaps incentivised.

5.6.3 International experience: Practical recommendations and wine and tourism sectoral alliances

From a policy perspective, a comparative analysis of the developmental strategies and managerial structures as experienced in internationally competitive countries would also add insight to wine tourism developmental planning. Although, not immediately transferable, specific examination of for example, American and Australian wine tourism development methodologies and successes could provide useful lessons for

the development of wine tourism specific development policies and practices for implementation in the South African market, especially with regard to the pertinent level and nature of governmental support and structures. Of further value would be research understanding the variety of possible wine and tourism alliances, inter-sector networks, collaborative benefits, funding initiatives, management structures and marketing systems found in these developed wine tourism countries.

5.7 Evaluation of the Research Process

This section analyzes the research process of this study - evaluating the approaches, decisions and tasks that were undertaken in the completion of this dissertation. However, determining the level of quality in qualitative research is not considered a simple task, for the rigid application of success criteria such as that used for a product or service, like wine and tourism, does not necessarily translate to a research dissertation (Poole, 2000).

In qualitative studies, such as this, Fendt & Sachs (2008: 21) emphasize that rather than inflexible adherence to a set of methodological tools and rules, the first requirement of qualitative research is “faithfulness” to the phenomena under study. That said though, there are a number of different frameworks and guidelines with a variety of terms and constructs that can be used to judge such qualitative research (Rolfe, 2006), but significantly for this study, these criteria do not easily transfer to grounded theory (Kirk & van Staden, 2001). However, in terms of evaluating the quality of the research process, it is considered important to establish some level of reader confidence that the research represents the meanings of a study’s participants (Lietz, Langer & Furman, 2006).

In considering this confidence, the following sub-sections facilitate the analysis of the research process undertaken by describing and evaluating the various research limitations, quality issues and the ethical considerations of this study.

5.7.1 Research Limitations

One of the primary limitations of the research process is intrinsically linked to the level of the researchers grounded theory experience. Commencing this study as a novice grounded theory researcher, several key aspects of the methodology were both confusing and daunting for the researcher; particularly the “Glaserian” versus “Straussian” debate on method and its evolving application, the scaling up of the coding process to higher levels of abstraction and quite simply, trusting the process to emerge a theory of the extended research period.

However, in an effort to minimise confusion over terminology and procedures, the preferences and motivations regarding the methodological “version” adopted for this study were clearly stated in Chapter 3. Through the consistent collective presence, utilisation and transparent description of all the core undisputed canons of grounded theory (Data Collection and Analysis, Theoretical Sampling, Constant Comparison and Explanation) throughout the data gathering process and research finding description and examination of chapter 4, this research summarily validates its claim to the “grounded theory” label (Goulding, 1998; Weed, 2009). And regarding the procedural doubts and methodological technique concerns experienced by the researcher; these are evidently considered a normal and sometimes inevitable pitfall in the initial stages of adopting the grounded theory process, especially when the initial research question and objectives are open and expansive, and the researcher is fairly unfamiliar with grounded theory as a whole (Rodon & Pastor, 2007).

The grounded theory methodology also presented limitations in terms of the requirements it makes upon the researcher, as it is clearly evident that a grounded theory emerges from the “extremely intensive, time consuming and all-absorbing” intellectual action and data interaction of the researcher (Fernandez, 2004: 92). Goulding (1998: 56) emphasizes that in order to fully utilize the grounded theory methodology, *“there must be recognition that it is time-consuming, often frustrating, and because of the nature of the method, often takes the research in a number of different directions before a plausible theory starts to emerge. This requires patience, an open mind and flexibility”*. This time and resource consumptive nature is exemplified in the processes of transcription, codification and constant comparison

described in chapter 3 and furthermore in the evidently extended duration of the actual study.

Therefore the concept of quality in research such as this is perceived to essentially revolve around the balance the researcher establishes between available resources and the effectiveness of the techniques used (Fluck, 2003). As the grounded theory methodology requires dedicated persistence on the part of the researcher in its application; it must therefore be conceded that time, cost and availability constraints can indeed limit the extent of data collection and good theory building for grounded theory investigations (Kirk & Van Staden, 2001). However, this study has taken place over a prolonged period (January 2007 to January 2010), facilitating a manageable time relationship between the researcher's necessary gainful employments and the conduction of research. This extended time frame also afforded a greater opportunity to fully explore all the emergent research avenues revealed in the ongoing data gathering and analysis process.

Obviously though, in the course of conducting this study, methodological limitations were experienced, such as haphazard and delayed stakeholder response and data gathering technique problems. However, these specific data gathering and analysis limitations and concerns have been previously described, evaluated and the mitigation thereof motivated in Chapter 3.

5.7.2 Research Quality

An intrinsic characteristic of the grounded theory methodology is the concern regarding the plausibility and relevance of the emerging theory to the research participants (Geiger & Turley, 2003). Strategies to legitimise qualitative research such as this do not necessarily require the imposition of an inflexible set of standards and procedures as those imposed in quantitative inquiry. Instead, Lietz, Langer & Furman (2006) suggest that the researcher engages in initiatives that increase confidence in the research findings being accurately representative of the meanings presented by study participants; thereby establishing *trustworthiness*.

There is some confusion amongst qualitative researchers regarding the numerous qualitative evaluation frameworks and terminology choices for accessing research

validity and reliability, and consensus has evidently yet to be reached as different positions remain not only viable, but fiercely debated (Fendt & Sachs, 2008; Lietz, Langer & Furman, 2006; Rolfe, 2006; Westphal, 2000). However, for the purposes of this study, Lincoln and Guba's (1985, in Lietz, Langer & Furman, 2006; Rolfe, 2006; Westphal, 2000) central issue of trustworthiness is considered the central research process evaluation construct, with its particular variables to consider for this study: dependability, credibility, confirmability and transferability.

Dependability (considered akin to the quantitative term *reliability*) is determined by the appropriateness and rigorous application of the research process itself. *Credibility*, (considered akin to the quantitative term *internal validity*) refers to the degree to which the researchers adequately represents the multiple constructed realities that exist in the minds of the study participants. *Confirmability*, (considered akin to the quantitative term *objectivity*) is concerned with the researcher's demonstration of neutrality in the research interpretations and degree to which sufficient information is provided so that the process can be confirmed. *Transferability*, (considered akin to the quantitative term *external validity*) refers to the extent to which the research findings can be applied in other contexts, situations and practices or with other research respondents (Ryan, 2006a; Ryan, 2006b; Siegle, 2002). How these aspects of trustworthiness have been addressed in the data gathering and analysis of the research framework have been comprehensively described in the previous respective sections of Chapter 3 (sections 3.2 to 3.5).

But in order to further facilitate the trustworthiness of the data gathering and analysis of the research, a number of strategies were employed to pursue the dependability, credibility, confirmability and transferability aspects of trustworthiness as described above. Firstly, as indicated earlier the study was conducted over an extended period from January 2007 to January 2010. This prolonged engagement with the research setting mitigated possible distortions from the researcher's impact on the context and from previous professional and academic experience; thereby limiting researcher bias and further compensating for the potential effects of unusual or seasonal events within the research setting (Siegle, 2002). Although there is also the suggestion that some of the data may have degraded in value and some insight may be obsolete during the time between entering the study field and the final write-up, the extended field

exposure however has summarily supported data saturation as evidenced in the clear emergence of recurring and consistently identified concepts, perspectives, explanations and core variable.

Another strategy employed by the researcher to effort data saturation and the completeness of undertaken sampling was *Triangulation*. Triangulation is regarded as a means of achieving validity (Sands & Roer-Strier, 2006) and is used to overcome the problem of “method-boundedness” where research is biased or skewed by a reliance on a single source of evidence (Poole, 2000: 171). In this study it was employed as an integrated data gathering verification protocol through the intentional seeking of different data sources and utilizing different collection methods. By specifically seeking differing respondents, informants and locations within the emergently broad study field of South African wine tourism, the range of information that was obtained from participants and data sources was maximized. This also acts as a coding check, confirming identified high levels of agreement but furthermore assisted in identifying and exploring theoretical ideas or ‘hunches’ and emergently rival, negative or contradictory explanations for the data and the research’s emergent theory, thereby providing a more thorough and bias-balanced account of the local wine tourism research context (Siegle, 2002). This was particularly prevalent in the light of wine tourism’s fragmentation and subjectivity of stakeholder priority and opinion.

It must be conceded though, that qualitative research is inherently *value-bound*. Even in the early preparatory stages of research and in identifying practical problems, the researcher’s own values do exercise an influence thereon. Qualitative research relies on the interpretations of the researcher, and to guard against these value judgments clouding the conclusions of the study, the researcher’s assumptions are stated and possible biases are expressed and detailed within the research framework and findings (Poole, 2000).

Ultimately though, the judgment on the part of the *reader* is considered to be the defining criteria for establishing a study’s trustworthiness (Rolfe, 2006). With this in mind, all the steps and decisions taken throughout the data gathering and analysis process of this study are comprehensively described and motivated in Chapter 3 and 4. This is intended to allow the reader to judge for themselves whether the research

design was adequate and if the process makes sufficient sense. Furthermore, it attempts to credibly establish the believability of the research findings and developed theory for South African wine tourism development described in Chapter 4 (Poole, 2000).

5.7.3 Evaluation of emergent theory

Strauss & Corbin (1990) identify four criteria for judging the applicability of theory to a phenomenon: (1) fit, (2) understanding, (3) generality, and (4) control. If the theory is faithful to the everyday reality of the substantive area and is carefully induced from diverse data, then it should fit that substantive area. If a researcher collected insufficient data and attempted closure too soon, then it is inherently impossible to meet this criterion. Such “fit” is ensured by the constant comparison and saturation followed in this research, and is exemplified in the clear relation of the emergent concepts and generated theory to the incidents and phenomena evident in the wine tourism research setting.

As such, the wine tourism development theory in this research is summarily postulated to reflect the processes structures, powers and causal mechanisms of the South African wine tourism reality. And because it represents a “reality”, the derived theory should be comprehensible to both the study participants and to stakeholders, academics and practitioners with experience in the specific area studied, thus meeting the criteria of understanding and underscoring the relevance of the theory as it thereby deals with the real concerns of those involved in the processes to which it applies, and is further able to offer analytical explanations for problems and processes that are evidently identifiable in the South African wine tourism context (Struebert & Carpenter, 1999; Weed, 2009).

In terms of generality, the comprehensive data, thorough analysis and conceptual interpretation from which the wine tourism developmental theory of this study emerged, facilitates that the theory is indeed abstract enough to include sufficient variation so that it may apply and offer insight and knowledge value to a variety of contexts related to wine tourism. Furthermore, wine tourism’s identified diversity of scope and the pioneering academic nature of this study and its postulated wine tourism development theory inherently invites ready further extension and continued

enhancement to accommodate new insights that are assumed will be provided by ongoing future research.

Finally, in terms of control, through this study's clear identification of key behaviours of concern and developmental limitations in South African wine tourism, the emergent theory thereby also provides a control and implies an empowerment with regard to identifying future actions toward furthering and sustaining local wine tourism development (Struebert & Carpenter, 1999; Weed, 2009).

5.7.4 Ethical considerations

The ethical considerations of research such as this underscore the importance of the relationship between researcher and reader that has been introduced in the previous sub-section. The larger dimensions of research ethics represent the nature of the researcher's decision to engage with the reader and the greater community of the research context. Summarily though, this research claims a larger integrity than simple adherence to regulatory issues of academic morality by specifically:

- respecting and crediting sources,
- preserving and acknowledging conflicting arguments and theories,
- revealing and considering opposing views,
- asserting claims only as strongly as they are warranted, and
- acknowledging the limits of researcher certainty (Booth, Colomb & Williams, 2003).

The researcher realizes the importance of preserving the rights of study participants and the impact such considerations could have on the value of the research. As such, in conducting this research, the above ethical principles were rigorously implemented in the realization of this dissertation. Specific considerations such as respondent consent, data security, privacy, confidentiality and other research gathering-specific and methodological issues have been introduced and discussed in the relevant data gathering and analysis in Chapter 3.

Finally, as inherent with the qualitative nature of this study and as introduced earlier, the researcher is clearly aware of their own "value-set" that has an unavoidable degree

of influence upon the study as a whole. As such, during the data gathering, analysis and theory development processes documented in this study, the researcher proactively embraced the point of view of a student, thereby acknowledging and benefiting from the wine tourism education, knowledge, experience and informed opinion of the study participants. This learning approach was exemplified in the open, honest and available communication policy that was adopted throughout the research process where participants could readily contact the researcher should any questions, concerns or suggestions arise.

5.8 Conclusion

This study identified and clarified the research concern and practical problem of slow and disparate development in the South African wine tourism industry, in specific cognizance of the increasingly evident dissatisfaction and frustratingly unrealized expectation of South African wine tourism potential by industry stakeholders. Impelled by an incomplete knowledge and understanding of the diverse aspects and elements of the South African wine tourism system, the primary overarching research question of this study was formulated as why is the South African wine tourism industry not realizing its perceived and identified potential? Hereby, the research direction of the study was focused on a relevant and contemporary orientation. The results and findings generated during the course of this research represent a scientific and academic recognition and formalization of the prevalent industry experience, insight, knowledge, experience and informed opinion of the vested stakeholders of South African wine tourism.

As such this study represents not only a comprehensive synthesis of wine tourism developmental literature but more significantly to the South African industry, it collectively pioneers a substantial and valuable contribution to the scarce body of available and accessible knowledge and research prevalent in the local context. Furthermore, as representative of an emerging international wine tourism region, the South African focus of this study; although not universally transferable and applicable due to the explained comparative limitations of industrial, policy and resource

diversity; does yet yield considerable insight and value for other developing wine and tourism countries and regions.

The evident definitional and subjective complexities of wine tourism were identified and analyzed within the industrial and organisational dissonance of the South African wine and tourism industries. And through the ongoing refinement and focus of the research process, the ambiguity and uncertainty of the assumed local wine tourism system were dispelled to emerge a directed and concise understanding of the actual developmental powers, processes, structures and causal mechanisms prevalent in the current South African wine tourism industry. In the revelation and confirmation of wine farmers and producers and wine routes as the cardinal wine tourism developmental determinants and resources, this research has significantly simplified the widely perceived multifarious complexity of the wine tourism industry, thereby offering a simultaneously appropriate, applicable and fundamentally necessary advancement of understanding wine tourism in South Africa.

Stemming from the identification of the critical developmental prerequisite of cooperation and coordination in the research findings; and with the further discovery and clear categorisation of the prevailing developmental limitations of inconsistent and uniformed expectations of wine tourism, severe industrial, political and organisational fragmentation, disparate stakeholder attitudes and conceptions, incompatible competitive business practices, inhibited developmental capacity and funding, and the relative South African research vacuity - the significance and central role of understanding wine tourism plainly and unambiguously emerged from the gathered data and sourced literature of the entire research process.

Therefore, the advancement of such “wine tourism understanding”, specifically in terms of individual perceptions and conceptions, industrial and business requirements, developmental leadership and the comprehension of shared responsibility, is fundamentally and unequivocally asserted by this study as essential to deconstructing the constraints of ingrained paradigms and practices, and facilitating the long-term actionable commitment of stakeholders to achieving realistic, but sustainable wine tourism industry growth and development in South Africa.

As such, within the collated literature and research results and findings, their analysis and considered implications and conclusions, and as a synthesis of stakeholder-comprehensible wine tourism knowledge, this study has essentially solved the research problem of needing to find out what is going on in South African wine tourism thereby presenting a data grounded theory that provides answers to the overarching research question of why the industry is not realizing its perceived potential? And from this emergent theory, the identified priorities of cooperation, coordination and understanding have subsequently shaped several key relevant, informed and valid recommendations to addressing the primary research concern original practical problem of slow, disparate and haphazard development that inspired the first undertaking of this study into wine tourism development in South Africa.

"... good company, good wine, good welcome, can make good people."

William Shakespeare's Henry VIII, Act I, Scene 4 (Ecask, 2007).

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APPENDICES

Appendix 1: Example of potential study participant initial contact email.

Good Day *[insert name]*

I am seeking your assistance in a research investigation as part of my Masters studies at the University of Cape Town's Graduate School of Business. I am studying toward a Master of Philosophy degree in Management Practice and Systems Approaches, specialising in wine tourism development and management in South Africa. Presently, I am conducting an investigation into *[insert appropriate small wins research paper title]*. This investigation is specifically focussed on *[insert specific project research objective based on the appropriate research question RQ1, RQ2, RQ3, RQ4, RQ5]*.

I would like to request your permission to obtain your experience, insight and input here upon as an identified stakeholder in the South African wine tourism industry. I would also sincerely appreciate your recommendation of other appropriate potential respondents that I could approach to participate in this study to ensure the validity of the research findings. Said study participation will involve an interview conducted in a format and at a time and location of your convenience before *[insert date]*. A transcript of the interview and the output of the research will be available on your request. The study adheres to strict academic rigour and the confidentiality of all participants is assured.

If you are indeed interested in assisting me by participating in this study, I would very much appreciate your indication hereof as soon as possible and I will contact you to arrange and outline the study procedures and requirements. My contact details are included below and if you require any further information regarding myself, the study itself or indeed if you have any concerns or suggestions, please do not hesitate to contact me.

I understand that your time is valuable and I thank you for your consideration. I look forward to hearing from you in anticipation of a successful and beneficial research relationship.

Yours sincerely

David Scott (student)
Student ID: sctdav006
Phone: 084 247 5011
Email: davidscott@sawt.co.za

Prof Tom Ryan (supervisor)
Phone: 021 406 1922
Email: clmasters@gsb.uct.ac.za

Appendix 2: Example of study information for potential study respondents prior to final arrangement of interviews.

Purpose of the Study:

This project intends to confront the unique developmental heritage and systems of South African wine tourism to uncover the central mechanisms involved in South African wine tourism development processes that have combined to shape the current industry and the evident frustrations and dissatisfaction of stakeholders in the slow and disparate levels of development. By establishing the current nature and extent of the industry and by furthering the academic body of knowledge in the local context and thereby providing concise and accessible South African-specific research, this study's ultimate goal is to address these concerns and identify critical determinants of successful and sustainable wine tourism growth and development. This specific investigation is captured in the guiding research question [*insert appropriate RQ*]

RQ1: What is the developmental history of South African wine tourism?

RQ2: Who is responsible for the development of the wine tourism industry in South Africa?

RQ3: What is the nature and extent of the management authority structures and operational systems in the South African wine tourism industry?

RQ4: How is wine tourism primarily employed and practically implemented as an industry in South Africa?

RQ5: What are the problems limiting South African wine tourism development?

Academic and technical information:

This research forms part of the study requirements for a M.Phil degree in Management Practice and Systems Approaches. Your participation will take the form of an interview, conducted by the researcher, David Scott. Associate Professor Tom Ryan of the University of Cape Town's Graduate School of Business is the supervisor of this research (contact details are included below). Your participation in the study is expected to contribute to this research as a stakeholder of the greater South African wine tourism industry.

The interview will be conducted in a face-to-face format, although a telephone or email format can be arranged according to the feasible convenience of your time and availability. The face-to-face interview will be conducted in a semi-structured conversational manner within an agreed appointment at a location of your choosing according to your schedule, lasting between 40 minutes and 1 hour. Telephone interviews will be conducted at a contact number of your preference and according to your availability. The email interview will involve an extended email correspondence with exploratory open questions. Comprehensive instructions and explanations will precede all the interviews.

The interviews will be transcribed into a digital document that will be available to you at your request. The results of the research will be submitted in a M.Phil dissertation, which will also be available to you in digital format. All your responses are confidential. No identifying information will be disclosed in the output of this research and all data will be securely stored. Your participation in this study is voluntary and you may withdraw from the study at anytime, without citing any reason. There are no expected risks associated with participation in this study.

Contact Details:

If you have any questions, further requirements or concerns please contact:

David Scott (student)
Student ID: sctdav006
Phone: 084 247 5011
Email: davidscott@sawt.co.za

Prof Tom Ryan (supervisor)
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Appendix 3: Example of Email Questionnaire: 2007.

South African Wine Tourism Industry Development Research:

1. To your knowledge, which organisation is currently responsible for developing South Africa's wine tourism industry?
2. Do you believe there is sufficient research in the South African wine tourism industry?
3. What information, research, initiatives or enterprise is most needed or would be most useful to you?
4. What do you think are the greatest stumbling blocks, hindrances, limitations and restraints on the development and competitiveness of the South African wine tourism industry?
5. What needs to be done to resolve these issues and what needs to be done first?
(What do you consider priority number 1?)
6. What do you expect of- and envisage for the future of the South African wine tourism industry?
7. Would you consider participating in further wine tourism studies at a later stage?
8. Would you like a copy of the research results?

Thank you for participating in this investigation, your time and input is greatly appreciated. If you have any queries or concerns pertaining to this investigation please do not hesitate to contact me

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Appendix 4: Sample Email Questionnaire: 2008.

South African Wine Route Management Research:

1. DETAILS:

1.1 Wine Route:

1.2 Location:

2. HISTORY:

2.1 What year was your wine route formed?

2.2 How many members did the route start with?

2.3 How many members do you currently have?

2.4 Who established your wine route? (E.g. Individuals, companies, farms)

2.5 What was the primary reason for the establishment of your route?

3. MANAGEMENT:

3.1 What are the functions that your wine route fulfils? Please list.

3.2 How does your route operate? I.e. do you have departments, committees, individuals with separate job duties, a chain of command, a single individual with a passion, volunteers, etc? Can you give a brief description of the system you have in place?

3.3 How are the route member farms involved in the management or decision-making processes? (E.g. Monthly meetings, committees, representatives, personal communication, etc)

3.4 Do the following bodies have any influence, relationship or affect upon your wine route? If yes, please briefly indicate the nature thereof:

South African Tourism:

South African Wine Council:

Wines of South Africa:

Cape Town Routes Unlimited:

South African Wine Industry Trust:

Local Municipalities:

Local tourism offices or bureaux:

Other wine routes:

Any other bodies or individuals (please list):

3.5 What is currently the biggest challenge, failing or stumbling block you face in managing your wine route?

4. MEMBERSHIP:

- 4.1 What are the criteria for farms to become members of your route?
- 4.2 How do you calculate your membership fees? (E.g. One fixed amount per year, depending on farm size or tonnage, etc)
- 4.3 Do you have any other funding sources? (E.g. Subsidies, sponsors, etc) If yes, who are they and do any conditions apply?
- 4.4 Can you identify any other possible future funding sources?

5. FUTURE:

- 5.1 What functions would you like a proposed centralised coordinating body for the wine tourism industry to fulfil?
- 5.2 How would you suggest such a body could be funded?
- 5.3 Would you like a copy of the final report?

Thank you for participating in this investigation, your time and input is greatly appreciated. If you have any queries or concerns pertaining to this investigation please do not hesitate to contact me.

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